

## Personal Tax Planning Checklist and Organizer

Please use this envelope to collect your income tax information

*It is your responsibility to ensure that the information provided is complete and contains no material errors or omissions. We cannot be held responsible for errors or omissions in your tax return as a result of incomplete or inaccurate information.*

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Email: \_\_\_\_\_  
 Phone: (R) \_\_\_\_\_ (B) \_\_\_\_\_  
 Dependent Children – Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_  
 \*Please ensure this is up to date for credits available\*  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Have you moved since we last prepared your tax return?  Yes  No

S.I.N. \_\_\_\_\_ Birthdate: \_\_\_\_/\_\_\_\_/\_\_\_\_ Citizenship(s):  Cdn.  U.S.  Other \_\_\_\_\_  
d m y

2009 Marital Status: \_\_\_\_\_ If marital status changed during 2009, please provide the following:  
 Date of change: \_\_\_\_/\_\_\_\_/\_\_\_\_ spouse's name: \_\_\_\_\_ date of birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ S.I.N. \_\_\_\_\_  
d m y d m y

**Please check each box that applies to your 2009 tax situation and provide supporting documentation.**

### INCOME

- T4 Employment Income
- T4A Other Income (commission, dividends, pension, pension adj.)
- T4(OAS) Old Age Security Pension
- T4A(P) Canada or Québec Pension
- T4RSP/RIF RSP or RIF Withdrawals or Annuities
- T4E Employment Insurance
- T5 Interest or Dividends
- T5006 Labour Sponsored Funds
- T5007 WCB Income
- T5008 Securities Transactions
- T5013 Partnership Income
- T3 Trust or Estate Income
- T3 Mutual Fund Income
- T101/T102 Exploration and Development Expenses
- RC62 Universal Child Care Benefit
- Foreign Income:  
(Investment, Pensions, Business, Rental, Employment)
- Rental Income and Expenses
- Self-employment Income and Expenses
- Capital Gains or Losses (include Dates of Disposals)
- Alimony/Maintenance Received
- U.S. Social Security

### DEDUCTIONS AND TAX CREDITS

- Employment Expenses (signed T2200)
- Stock Option Deferral Certification
- Union or Professional Dues
- Medical/Dental Receipts, including premiums
- Tuition Receipts (signed)/Student loan interest
- Donation Receipts – (official not pledges)
- Child Care Expenses and Receipts
- RRSP Contributions
- Safety Deposit Box
- Alimony/Maintenance Payments
- Interest/Carrying Charges
- Moving Expenses
- Political Donations
- Changes in Dependents
- Living Common-law
- Disability Credit
- 2008 T1 Fees (if KNV did not prepare T1)
- Relative Cared For In Your Home
- Public Transit Passes
- Children's Fitness Program Expenses
- Trades Person's Tools
- Home Renovation Tax Credit
- First Time Home Buyers Amount
- Note any other details on a separate sheet**

**CONTINUED ON REVERSE**

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### Miscellaneous:

- 2009 Instalment Forms    2008 Assessment Notice    Address label provided by Canada Revenue Agency (CRA)
- GST Return preparation required    T2124 Business Income Expenses (see attached summary)
1. Do you own **non-RRSP** mutual funds?    Yes    No   If Yes, please provide 2009 investment statements (non-RRSP only).
  2. Do you spend significant periods of time in the U.S.A.?    Yes    No   If Yes, approximate time in 2009 \_\_\_\_\_
  3. If you would like to have all government tax refunds and benefits directly to your bank account, please tick here  and enclose a voided cheque for your bank account, if you do not already use direct deposit for these payments.
  4. (a) Did you own foreign assets during 2009?    Yes    No   If Yes, and the cost totalled more than \$100,000, please provide a breakdown (see below).
  - (b) Did you earn income or realize gains for foreign assets in 2009?    Yes    No   If Yes, please provide details.
  - (c) Did you receive property or funds (including a loan) from a non-resident trust in 2009?    Yes    No   If Yes, please provide details.
  5. Elections Canada is asking for your consent to help keep the National Register of Electors up to date from certain information on your tax return. Do you authorize CRA to provide **only** your name, address, and birth date to Elections Canada?    Yes    No

## INFORMATION REGARDING FOREIGN ASSETS

The Canada Revenue Agency has specific reporting requirements for the ownership of foreign property having a total cost exceeding \$100,000 (CDN).

### Properties to be reported include:

- Foreign bank accounts
- Rental property located outside Canada
- Investments (whether via equity or loan) in foreign companies, trusts, partnerships, and other foreign entities (even if held by a Canadian broker)
- Options to acquire any of the above types of property
- Property convertible into any of the above types of property

### Properties not to be reported include:

- Foreign property held in an RRSP
- Property used primarily for personal purposes
- Property used exclusively in an active business

If you owned certain property outside of Canada totaling more than \$100,000, as described above, at any time during 2009, it may be necessary for you to declare such ownership in your tax return.

**There are substantial fines and penalties for non-compliance even if no income tax is owed. Foreign asset reporting forms such as the T1135, T1141, and T1142 must be filed by your tax return due date.**