



It is time to prepare your _____ YYYY tax return. Providing complete and accurate information will allow us to prepare your tax returns timely and efficiently. With this in mind, below you will find a checklist and questionnaire for you to assist you in gathering the required items.

Mandatory Electronic Filing

The CRA requires approved tax preparers to file tax returns electronically. To comply with this new rule, your tax returns will be transmitted to the Canada Revenue Agency (CRA). Please answer the related questions on the checklists.

Principal Residence Reporting

All taxpayers who sell their home must report the sale on their tax return, even if it was their principal residence for the whole time they owned it. There are substantial penalties for not reporting the sale. If you sold your home in this tax year, provide the details on the attached questionnaire.

Foreign Property Disclosure

Canadian resident individuals who held property outside Canada with a total cost more than \$100,000 CAD at any time in the tax year must comply with special reporting to the CRA. There are substantial penalties for non-compliance. Please complete the attached questionnaires.



Tax Information Checklist

Family information

Has your marital status changed? Yes No

Are there any changes to your dependants?
(provide SIN, name and birth date) Yes No

Questions required for electronic filing

Are you a Canadian Citizen? Yes No

Do you agree to Canada Revenue Agency providing your name, address, and
date of birth to Elections Canada for the National Register of Electors? Yes No

Principal residence reporting

Complete address of the home sold (including postal code): _____ Year
purchased _____
Sale price _____

Supporting documents

Notice(s) of (re)assessment for
the prior tax year

Other/new income sources

- First year for CPP, OAS?
- T4E for employment insurance payments
- RC 62 for universal child care payments
- Alimony and/or maintenance received
- Rental property revenue & expenses
- Business, self-employed income & expenses

Receipts

- RRSP contributions and withdrawal
- Union or professional dues
- Donations
- Medical expenses, including plan premiums
- Child care
- Child fitness/sports
- Child arts
- Student loan interest
- T2202 tuition fees
- Moving expenses
- Transit pass
- T2200 Employment expenses
- Investment expenses (interest, mgmt. fees)
- Alimony and/or maintenance paid



T1 Foreign Property Reporting

Canadian resident individuals who held certain property outside Canada with a total cost of more than \$100,000 CAD at any time during the tax year are subject to certain disclosure requirement to the Canada Revenue Agency (CRA).

Non-compliance with this reporting requirement results in severe penalties. To help us determine whether you are subject to the reporting rule, please read and consider each of the following questions carefully when answering them.

If you owned any of the following property at any time during the tax year, answer YES to the relevant questions. You may be subject to the foreign property reporting rule, and we may prepare additional forms to submit to the CRA.

1. Funds or intangible property (patents, copyrights, etc.) situated, deposited or held outside Canada Yes No
2. Tangible property situated outside of Canada Yes No
3. A share of the capital stock of a non-resident corporation held by the taxpayer or by an agent on behalf of the taxpayer Yes No
4. An interest in a non-resident trust that was acquired for consideration, other than an interest in a non-resident trust that is a foreign affiliate for the purposes of section 233.4 Yes No
5. An interest in a partnership that holds a Specified Foreign Property unless the partnership is required to file a T1135 Yes No
6. An interest in, or right with respect to, an entity that is a non-resident Yes No
7. A property that is convertible into, exchangeable for, or confers a right to acquire a property that is Specified Foreign Property Yes No
8. A debt owed by a non-resident, including government and corporate bonds, debentures, mortgages, and notes receivable Yes No
9. An interest in a foreign insurance policy Yes No
10. Precious metals, gold certificates, and futures contracts held outside Canada Yes No

Signature: _____

Date: _____

Signing date DD/MM/YYYY