

Island Tax & Bookkeeping Personal Tax Return Check List

DATE:

New Client

Yes or No

1 Personal Information			
Name(s)	SIN	Date of Birth	Phone
		YYYY/MM/DD	Preferred
		YYYY/MM/DD	Alternate
Martial Status: Single Married Common-Law Divorced Separated Widowed Has marital status changed in the tax year? If yes, please provide date:			
Address:			
Email			

2 Residence	
Province or territory of residence on December 31 for tax filing year	_____
Did the taxpayer immigrate to or emigrate from Canada during the year?	yes or no
If yes, provide date of entry or departure:	
NEW!	
Did the taxpayer sell their principal residence during the tax year?	Address of sold house: yes or no
If Yes: What year did you originally buy the residence?	
If Yes: What was the sale price of the residence?	
If Yes: Did you co-own the home with someone else? Who?	
If Yes: Was the residence your ONLY primary principal residence the entire time?	
Did you ever rent out the residence?	

3 Elections Canada	
Is the taxpayer a Canadian citizen?	yes or no
If yes, do you authorize CRA to update your address with National Register of Electors?	yes or no

4 Foreign Reporting	
Did the taxpayer own or hold foreign property or cash with a total cost of more than \$100,000?	yes or no
Including Bank Accounts and Investments in foreign stocks. If yes, please provide details with any foreign income earned.	

5 Dependents					
Name	Relationship	Date of Birth	Income	SIN	Transfer Tuition? Other?
		MM/DD/YYYY			
		MM/DD/YYYY			
		MM/DD/YYYY			

6 Pension	
Does the taxpayer elect to split eligible pension income with spouse?	yes or no
Foreign pension income? Please provide details	yes or no
Foreign tax paid? Please provide details	yes or no

7 Self Employment/ Rental Income	
Do you have self employment income ?	yes or no
Does a GST return need to be filed for your proprietorship?	yes or no
Do you have rental income?	yes or no

8 CERTIFICATION	
I CERTIFY THAT THE INFORMATION GIVEN ON THIS FORM AND DOCUMENTS INCLUDED, IS, TO THE BEST OF MY KNOWLEDGE, CORRECT AND COMPLETE. I HAVE OBTAINED THE CONSENT OF MY SPOUSE AND OR DEPENDENTS IF APPLICABLE TO PREPARE TAX RETURNS X	

9 Client Notes/Comments	
PLEASE LET US KNOW ABOUT ANY CHANGES, QUESTIONS OR CONCERNS	
If you would like to set up direct deposit, or change banking information, please include a void cheque.	
	yes or no

Internal Use Only

Client Phoned:	New Clients - Signed Auth.?	Auto Fill Complete?
Notes:		