

Island Tax & Bookkeeping Personal Tax Return Checklist

DATE:

Personal Information		New Client	Yes or No
Taxpayer 1	SIN	DOB	MM/DD/YYYY
Email:	Phone:		
Taxpayer 2	SIN	DOB	MM/DD/YYYY
Email:	Phone:		

Martial Status: Single Married Common-Law Divorced Separated Widowed		
Has marital status changed in the tax year? If yes, please provide date:		Spouse net income if not filing together:
Mailing Address:		

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

Residence	Elections Canada	
Province or territory of residence on December 31 for tax filing year:	Is the taxpayer a Canadian citizen? <b>yes or no</b>  If yes, do you authorize CRA to update your address with National Register of Electors? <b>yes or no</b>	
Did the taxpayer immigrate to or emigrate from Canada during the year?		<b>yes or no</b>
If yes, provide date of entry or departure:		
If yes, spouse's or common-law partner's net income while the taxpayer is living in of Canada:		
If yes, spouse's or common-law partner's net income while the taxpayer is living outside of Canada:		
If yes, canadian sourced non-resident income:		
If yes, foreign sourced non-resident income:		

Real Estate	BC Renter's Credit
Did the taxpayer sell any real estate including principal residence during the tax year?	Did the tax payer rent for at least 6 months during the year?
If yes: When was it sold?	<b>yes or no</b>
If Yes: What year did you originally buy the residence?	Was rent paid to an arm's length party? (Payments to relatives are not eligible)
If Yes: What was the sale price of the residence?	<b>yes or no</b>
If Yes: Did you co-own the home with someone else? Who?	Rent paid: \$
If Yes: Was the residence your ONLY primary principal residence the entire time?	Number of months:
If Yes: Did you ever rent out the residence?	Name of landlord:
Address of sold real estate:	Rental address same as mailing? If no, add below:

First Home Savings Account	
Did you open a First Home Savings Account (FHSA)?	<b>yes or no</b>

Pension	Foreign Reporting	
Does the taxpayer elect to split eligible pension income with spouse?	Did the taxpayer own or hold foreign property or cash with a total cost of more than \$100,000?	
Foreign pension income? Please provide details		Including Bank Accounts and Investments in foreign stocks. If yes, please provide details with any foreign income earned.
Foreign tax paid? Please provide details		
Self Employment/Rental Income		
Do you have self employment income ?		
Does a GST return need to be filed for your proprietorship?		
Do you have rental income? Please specify: Short term / Long term / Both		
CERTIFICATION		
I CERTIFY THAT THE INFORMATION GIVEN ON THIS FORM AND DOCUMENTS INCLUDED IS, TO THE BEST OF MY KNOWLEDGE, CORRECT AND COMPLETE.		
X		

Client Notes/Comments	
PLEASE LET US KNOW ABOUT ANY CHANGES, QUESTIONS OR CONCERNS.	Any additional documentation can be emailed to: info@islandtax.ca

*Internal Use Only*	
Client Phoned / left message:	CRA Access? <input type="checkbox"/> They will add <input type="checkbox"/> NOA+signed auth <input type="checkbox"/> Unable Auto Fill Complete?
Notes:	Client signature upon completed tax return pick up