

Island Tax & Bookkeeping Personal Tax Return Checklist

DATE:

New Client

Yes or No

Personal Information

Taxpayer 1	SIN	DOB
Email:	Phone:	MM/DD/YYYY
Taxpayer 2	SIN	DOB
Email:	Phone:	MM/DD/YYYY

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

Province or territory of residence on December 31 for tax filing year:	yes or no	Elections Canada
Did the taxpayer immigrate to or emigrate from Canada during the year?		Is the taxpayer a Canadian citizen? yes or no
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

Did the taxpayer sell any real estate including principal residence during the tax year?	yes or no	BC Renter's Credit
If yes: When was it sold?		Did the tax payer rent for at least 6 months during the year? yes or no
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) yes or no
If Yes: What was the sale price of the residence?		Rent paid: \$
If Yes: Did you co-own the home with someone else? Who?		Number of months:
If Yes: Was the residence your ONLY primary principal residence the entire time?	yes or no	Name of landlord:
If Yes: Did you ever rent out the residence?		Rental address same as mailing? If no, add below:
Address of sold real estate:		

First Home Savings Account

Did you open a First Home Savings Account (FHSA)?	yes or no
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Pension

Does the taxpayer elect to split eligible pension income with spouse?	yes or no	Foreign Reporting
Foreign pension income? Please provide details	yes or no	Did the taxpayer own or hold foreign property or cash with a total cost of more than \$100,000?
Foreign tax paid? Please provide details	yes or no	Including Bank Accounts and Investments in foreign stocks. If yes, please provide details with any foreign income earned.

Self Employment/Rental Income

Do you have self employment income ?	yes or no	yes or no
Does a GST return need to be filed for your proprietorship?	yes or no	
Do you have rental income? Please specify: Short term / Long term / Both	yes or no	

CERTIFICATION

I CERTIFY THAT THE INFORMATION GIVEN ON THIS FORM AND DOCUMENTS INCLUDED IS, TO THE BEST OF MY KNOWLEDGE, CORRECT AND COMPLETE.	X
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Client Notes/Comments

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