



PERSONAL TAX INFORMATION CHECKLIST

Your Contact Information

Name:
Address:
City:
Postal Code:
Phone:
Date of Birth:
Social Insurance Number:
Email Address:

Spousal Information

Marital Status:
(single, married, divorced, common-law)
Date of Change of Status:
Name of Spouse:
Phone:
Date of Birth:
Social Insurance Number:
Email Address:

Dependants (provide SIN, name and birth date):

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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

Supporting documents to provide:

Notice(s) of (re)assessment for last tax year filed & applicable slips and receipts. See following page for checklist.



Income sources to claim for the tax year:

- 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/Deductions you have for the tax year:

- 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
- First time Home Buyer's Credit

Please return supporting documents and completed form to:

info@jrandco.ca



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 of 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

The above stated facts are correct and true, as per my knowledge.

Signature: _____ Date: _____