



IFC Personal Tax Checklist

PERSONAL INFORMATION

Tax Year: _____

You	Your Spouse
Name:	Name:
SIN:	SIN:
Date of Birth (MM/DD/YY):	Date of Birth (MM/DD/YY):
Address:	Address:
Postal Code:	Postal Code:
Phone:	Phone:
Cell:	Cell:
E-mail:	E-mail:
Canadian Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No	Canadian Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No
American Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No	American Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No
Marital Status:	<div style="display: flex; justify-content: space-around;"> Single Married Common-Law </div> <div style="display: flex; justify-content: space-around;"> Divorced Separated Widowed </div>
Did your Marital Status change this year? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, provide date (MM/DD/YY):	
If yes, explain nature of change:	

Dependents			
Name	Date of Birth (MM/DD/YY)	Relationship	SIN
Did you receive the Canada Child Tax Benefit (CCTB) this year? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Did you pay Child Care expenses this year? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Do any of your dependent children earn an income? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Are any of your dependent children 18 or over? <input type="checkbox"/> Yes <input type="checkbox"/> No			

Additional Considerations	
Did an immediate family member die or become disabled during the year?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you sell a house during the year?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you participate in the Home Buyer's Plan (HBP) during the year?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you participate in the Lifelong Learning Plan (LLP) during the year?	<input type="checkbox"/> Yes <input type="checkbox"/> No

INSTRUCTIONS:

1. Check if applicable to you	2. If applicable, provide relevant information
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GENERAL INFORMATION

Any changes to:	
Name?	<i>Provide details</i>
Address?	<i>Provide details</i>
Email?	<i>Provide new address</i>
Dependent(s)? <i>(New child or adult)</i>	<i>Provide name, date of birth, relationship, SIN, and if applicable, Dependent's income</i>
Please provide:	
Notice of Assessment from CRA	<i>Copies of all pages</i>
Reassessment Notices received	<i>Copies of all pages</i>
Installments paid	<i>Copy of statement – T2DR</i>
Credits to be transferred to you <i>(Tuition, public transit, age, disability)</i>	<i>Provide details</i>

EMPLOYMENT INCOME

Regular earnings	<i>All T4's or pay slips</i>
Odd jobs, tips	<i>Pay slips, details</i>
Director's fees	<i>T4's or details</i>
Profit-sharing income	<i>T4PS slip</i>
Loans from employer	<i>Full details</i>
Any other Employment Benefits	<i>Full details</i>
If you are Self-Employed →	*Complete IFC Self-Employment Checklist

PENSION, RETIREMENT & ANNUITY INCOME

Canada Pension	<i>T4A (P)</i>
Old Age Security	<i>T4A (OAS) slip</i>
Employment (including Rental Allowance)	<i>T4A</i>
Foreign (e.g. US Social Security)	<i>Details, foreign slips</i>
Life Income Fund (LIF)	<i>T4RIF</i>
Registered Retirement Income Fund (RRIF)	<i>T4RIF</i>
Withdrawal from an RRSP	<i>T4RSP slips, details</i>
Annuity Payments	<i>Full details, information slips</i>
Other	<i>Details</i>

INVESTMENT INCOME	
Interest – Bank account	<i>T5 slips or bank statements</i>
Interest – Canada Savings Bond	<i>T5, T600 or T600C (details, if no slips – for accrual)</i>
Interest – Joint account with spouse	<i>Details of split</i>
Interest – Mortgage or other loans	<i>Year-end statements, amortization schedule</i>
Interest – Treasury bills	<i>Full details of transactions</i>
Dividends – Canadian Corporation	<i>T5 slips and statements</i>
Foreign Interest or Dividends	<i>Foreign slips or details</i>
Mutual Fund investment income	<i>T3 slips and statements</i>
Royalty or other investment income	<i>T5013</i>
Term Deposits or GICs	<i>T5 slips or details</i>
Other	<i>T5008 or other information</i>

INCOME THROUGH SALE/EXCHANGE OF INVESTMENTS	
Real Estate and other properties	<i>Sale documents, details of purchase</i>
Properties gifted to others	<i>Full details</i>
Elections in prior years	<i>Full details</i>
Prior year Reserves	<i>Full details</i>
Stocks, Bonds, Trust Units	<i>Transaction slips/details, broker statements for any month with a transaction, trading summary</i>

OTHER INCOME	
Alimony or Child Support received	<i>Full details</i>
Employment Insurance Benefits	<i>T4E slip</i>
Scholarships, Bursaries	<i>T4A slip(s), details</i>
Social Assistance Payments	<i>Full details, slips</i>
Universal Child Care Benefit (UCCB)	<i>RC62 slip</i>
WCB Benefits	<i>T4, T5007, details</i>
If you own Rental Property →	*Complete IFC Rental Income Checklist
Other	<i>Full details</i>

EMPLOYMENT-RELATED EXPENSES	
General - When employer requires you to pay certain expenses	<i>Form T2200</i>
Moving expenses	<i>Details of charges</i>
Transport Employees	<i>Form TL2</i>
Travel/Auto	<i>Expenses and calculation of business mileage</i>
Union or Association Dues	<i>Official tax receipts</i>
Other Expenses	<i>Details of charges</i>

DEDUCTIONS AND CREDITS	
Adoption expenses	<i>Full details</i>
Alimony or Separation Allowance paid	<i>Record of payment and details</i>
Child Care amounts paid	<i>Details of payments</i>
Children's Art Credits (Includes Tutoring)	<i>Receipts – MUST include Child's Name and indicate 'Arts Tax Receipt' or 'Fitness Tax Receipt', or Eligible Amount for Tax Credit</i>
Children's Fitness Credits	
Non-resident Dependent supported	<i>Full details</i>
Parent over 65 lives with you	<i>Full details</i>
Acting as Caregiver for extended family member	<i>Full details</i>
Disability Credit	<i>Form T2201 (first year)</i>
Disability Support Costs incurred	<i>Full details, form T929</i>
Medical expenses for any 12-month period ending in tax year (including private insurance, premiums and amounts deducted from your pay cheque)	<i>Receipts and details</i>
Donations to Registered Charities	<i>Official tax receipt(s)</i>
Unused prior year Donations	<i>Full details</i>
Post-secondary Tuition fees paid (over \$100)	<i>Official tax receipt(s)- T2202A, TL11</i>
Dependent attended University	<i>Official tax receipt(s)- T2202A, TL11</i>
Transit Passes	<i>Receipts</i>
Political Contributions	<i>Official tax receipt(s)</i>
RRSP Contributions	<i>Official tax receipt(s)</i>
(Canadian) Film or Video Production (Services)	<i>Full details</i>
Loss on Shares of- or Loans to- a private company	<i>Full details</i>
Oil & Gas or Mining investments	<i>Full details</i>
Stocks/Bonds rolled over into RRSP	<i>Official tax receipt(s) and details</i>
Other	<i>Full details</i>

INVESTMENT EXPENSES	
Accounting fees to record income	<i>Details of charges</i>
Borrowed money to earn investment income	<i>Record of interest paid</i>
Borrowed on Margin Account (Stocks)	<i>Records from broker</i>
Investment counsel and management fees	<i>Details of charges</i>
Tax Shelters	<i>Purchase documents</i>

FOREIGN REPORTING REQUIREMENTS	
Received funds from a Foreign Trust after 1995, or have ever transferred or loaned property to a Foreign Trust	<i>Full details- discuss situation</i>
Own over 1% of a Foreign Corporation or Trust, and together with related parties own over 10%	<i>Full details- discuss situation</i>
Owned assets outside of Canada with a cost in excess of \$100,000 (CDN) during the year	<i>Full details- discuss situation</i>
Became or ceased to be a resident of Canada	<i>Date of status change</i>