



# PERSONAL TAX CHECKLIST

PERSONAL INFORMATION	DATE OF BIRTH	SIN	CITIZENSHIP
Name	YYYY/MM/DD		<input type="checkbox"/> Canadian <input type="checkbox"/> U.S. Citizen P.R. <input type="checkbox"/> Other: _____
Name of Spouse	YYYY/MM/DD		<input type="checkbox"/> Canadian <input type="checkbox"/> U.S. Citizen P.R. <input type="checkbox"/> Other: _____
Dependent 1	YYYY/MM/DD		<input type="checkbox"/> Canadian <input type="checkbox"/> U.S. Citizen P.R. <input type="checkbox"/> Other: _____
Dependent 2	YYYY/MM/DD		<input type="checkbox"/> Canadian <input type="checkbox"/> U.S. Citizen P.R. <input type="checkbox"/> Other: _____
Address	City	Province	Postal Code
Email	Phone Number: <input type="checkbox"/> Cell <input type="checkbox"/> Office <input type="checkbox"/> Home		
Spouse Email	Spouse Phone Number: <input type="checkbox"/> Cell <input type="checkbox"/> Office <input type="checkbox"/> Home		
Dependent 1 Email	Dependent 1 Phone Number: <input type="checkbox"/> Cell <input type="checkbox"/> Office <input type="checkbox"/> Home		
Dependent 2 Email	Dependent 2 Phone Number: <input type="checkbox"/> Cell <input type="checkbox"/> Office <input type="checkbox"/> Home		

Have you moved to a new address in the past year?  YES  NO

Have there been any changes to your family situation this past year?  YES  NO

Are any of your family members disabled?  YES  NO

Do your parents (over 65) live with you?  YES  NO

Did you purchase your first home in the past year?  YES  NO

If we didn't prepare your return last year, please provide last year's tax return, assessment notices and any CRA correspondence.

If we will not be preparing your spouse's tax return, please provide their net income from line 236 of their tax return: \$ \_\_\_\_\_

Did you own or hold foreign property (real estate, investments, loans, etc) in the past year with a total cost of more than \$100,000 CAD?  YES

**NO NOTE:** This includes foreign securities held in Canadian investment accounts and cash held outside of Canada, shares of a foreign company, units in a foreign partnership and crypto currencies stored on a foreign exchange or foreign wallet.

Did your marital status change in the past year?  YES  NO

Additional dependents?  YES  NO - provide name(s) & DOB

Do you own residential property in Canada? YES NO

# INCOME

Please check all that apply to you and/or your spouse and provide the required paperwork:

TYPE OF INCOME		PAPERWORK REQUIRED
<b>Employment Income</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	T4 and T4A employment slips
- Other employment income such as tips or stock options	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide total dollar amount
- Stock options exercised during the year	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide details
<b>Self Employment Income</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Fill out the Goldsmith Kwok Self Employment Worksheet
<b>Employment Expenses</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	T2200 signed by employer
- Non-reimbursed expenses related to earning commission or other income.	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Receipts for all expenses to be claimed and signed T2200 from your employer
<b>Pension Income</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	T4A Slip
- Old Age Pension (OAS)	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	T4A-OAS Slip
- Canadian Pension Plan (CPP)	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	T4AP Slip
- Foreign Pensions	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	
<b>Rental Income</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Fill out the Goldsmith Kwok Rental Income Worksheet
<b>Investment Income</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	T5, T3 and/or T5013 Slips
- Interest and/or dividends from mutual funds, trusts, estates, corporations and/or limited partnerships.		
<b>Capital Gains (Losses) and Allowable Business Investment Losses</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	For investments sold, provide details of each item including a description of the investment, year of acquisition, original cost, sale proceeds, commissions and other costs.
- Did you dispose of any investments during the last year? This includes shares, bonds, mutual funds, personal use property, rental property and other real estate. Indicate if any residential real estate was owned for less than 365 days.		
<b>Other Income</b>		
- Employment Insurance Benefits	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	T4E Slip
- Estates (income from trusts)	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	T3 Slip
- Scholarships	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	T4A Slip
- Workers Compensation Board (WCB) payments	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	T5007 Slip
- RRSP and/or RRIF	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	T4RSP Slips for withdrawal of contributions
- Alimony or Child Support Payments Received	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide name, address and SIN of recipient
- Interest, Dividends and Mutual Funds	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	T5, T3 and/or T5013 Slips
- Foreign Income and Foreign Taxes paid	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide details of income and copy of foreign tax return
- Other income earned for which you did not receive a slip	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide details of income including type and amount

## DEDUCTIONS AND EXPENSES

Please check all that apply to you and/or your spouse and provide the required paperwork:

TYPE OF DEDUCTION OR EXPENSE		PAPERWORK REQUIRED
<b>Interest Paid</b> on money borrowed for stocks, bonds, CSB, business loans, tax shelters, or other income.	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide a list showing loan balance, interest paid and purpose of loan
<b>Income Tax Instalments Paid</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide total dollar amount
<b>Investment Counsel Fees</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide statement
<b>Professional and Union dues</b> or other similar fees	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide all receipts
<b>Alimony or Separation Allowances</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide name, address, SIN to whom paid and amount. Attach agreement.
<b>Tuition Fees</b> for self, spouse and/or dependent	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide T2202A or TL11A slips. For international universities, ensure receipt completed and signed front and back, with currency noted.
<b>Tax Shelters and Flow Through Shares</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide all applicable information slips incl. T5013, T101
<b>Moving Expenses</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide all receipts (must be related to new job or school)
<b>Child Care Expenses</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide Nanny's name, address and SIN and/or daycare/pre-school name and address and amount paid
<b>Adoption Expenses</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide all receipts
<b>Student Loan Interest</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide statement (must be part of CSL program) Government loans only
<b>RRSP Contributions</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide receipt for previous year and any contributions made before the first 60 days of current year
<b>Home Buyers' Plan and Lifelong Learning Plan</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide details on if repayment is required and if so, amount to be paid.
<b>First Home Savings Account Contributions</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide tax slip showing contribution
<b>Charitable Donations or Political Contributions</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide receipts issued by valid charities and/or political organizations
<b>Medical and Dental Expenses</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide total dollar amount and summary or receipts
<b>Disability Credit</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide Form T2201 - disability tax credit certificate
<b>Digital News Subscription Tax Credit</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide receipt for digital news subscription.
<b>Accounting Fees</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide receipts if work not performed by Goldsmith Kwok Accounting Group LLP
<b>Home Renovation for seniors &amp; persons with disabilities</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide all receipts
<b>Secondary Suite for Family Member</b>	<input type="checkbox"/> SELF <input type="checkbox"/> SPOUSE	Provide all receipts