

# Halina Kiluk

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## Personal Tax Return Checklist

Name \_\_\_\_\_ SIN \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

Date of Birth \_\_\_\_\_ Marital Status \_\_\_\_\_

Are we to process spousal return as well?  Yes  No

If No please provide your spouses Net Income for a year \_\_\_\_\_

Any new children born in a year?  Yes  No If yes please provide information

Please provide  Copy of last year tax return  Copy of last year Notice of Assessment

### Income

- T4 - Employment Income
- T4A - Pensions Income and other income (including foreign pensions)
- RC62 - Universal Child Care Benefit
- Rental Income
- Self-Employment Income
- T5 - Investment Income (Capital gain and losses)

### Deductions

- RRSP slips
- Union, Professional dues
- Childcare
- Moving expenses (if moved 40km to new work)
- Alimony
- Carrying charges

### Credits

- T-2202 – Tuition Education
- Student Loans Interest
- Child Fitness
- Medical Expenses
- Donations
- First Time Home Buyer
- Rent Paid + Landlord name
- Property Taxes Paid
  
- Tax Installments Paid