KIEL & COMPANY
PROFESSIONAL CORPORATION
CHARTERED ACCOUNTANT

PERSONAL INCOME TAX RETURN CHECKLIST

(Please complete one checklist per person reporting income)

PERSONAL INFORMATION			
NAME	S.I.N.	D.O.B	HOME PHONE
TAXPAYER:			
SPOUSE:			
EMAIL:	FAX:		
Current Address Address at Dec 31 if different			
MARITAL STATUS: __ Married __ Single __ Common-law __Separated __Divorced __Widowed If married/common-law, will your tax return be filed jointly with your spouse's return? __Yes __No If spouse's return is being filed separately, what was your spouse's net income? $___________________ Was your spouse self-employed for that taxation year? __Yes __No			

DEPENDENTS: NAME	RELATIONSHIP	D.O.B.	S.I.N.	DISABLED?	INCOME $	UniversalCare Benefit $

CHANGES IN PERSONAL OR FINANCIAL SITUATION DURING THE YEAR
If the taxpayer moved to Canada last year, give date of entry:
If marital status changed last year, give date & change:
If taxpayer died last year, please give date of death:
If taxpayer declared bankruptcy last year, please give date of bankruptcy:
Did any changes happen to the taxpayer's circumstances that will affect this tax return?

E-File or paper file
Does the taxpayer consent to E-file the tax return __Yes __ No. If yes you must sign a T183 Authorization

ELECTIONS CANADA
Does the taxpayer consent to allow the CRA to transfer to Elections Canada his/her name, address, and date of birth to update the National Register of Electors? __Yes __ No

FOREIGN REPORTING	
Last year, did you own more than $100,000 of foreign property? __Yes __No If yes then provide information necessary to complete CRA form T1135 Foreign Income Verification Statement:	
Foreign income received: $	Foreign tax paid: $

EMPLOYMENT INCOME AND DEDUCTIONS
Taxpayer earned income from employment and has attached T4 Employment Income: __Yes __NO
Taxpayer received employment insurance and has attached T4E Employment Income: __Yes __No
Taxable benefits not shown on the T4 slip:
Taxpayer received employment income in the form of commission: $
Taxpayer received a GST/HST rebate relating to previous year's personal return.
Taxpayer paid union/professional dues (to whom & amount):
Taxpayer is claiming deductible employment expenses and provided signed T2200: __Yes __No
Taxpayer participated in an employee profit sharing plan and attached T4PS: __Yes __No
Tools acquired by an apprentice:
Other employment related income (e.g. T212 Statement of Deferred Security Options Benefits):

RRSP CONTRIBUTIONS AND REPAYMENTS
Taxpayer contributed to RRSP(s) and has attached RRSP contribution receipts: Contribution to own RRSP: __Yes __No Contribution to spousal RRSP: __Yes __No
Taxpayer must report RRSP contribution as repayment of Home Buyers Plan: $
Taxpayer must report RRSP contribution as repayment of Lifelong Learning Plan: $
Taxpayer contributed to Labour Sponsored Investment Fund and attached federal T5006 and Ontario OIEO: __Yes __No
Prior year's CRA Notice of Assessment (NOA) form is included with your information. We cannot rely on any other information to determine RRSP limits other than the NOA __ Yes __ No

PENSION AND OTHER REGISTERED PLAN INCOME
Taxpayer received Old Age Security and attached T4A(OAS): __Yes __No
Taxpayer received Canada Pension Plan and attached T4A(P): __Yes __No
Taxpayer received pension or annuity income with or without T4A: __Yes __No
Taxpayer received RRIF income and attached T4RIF: __Yes __No
Taxpayer received RRSP income and attached T4RSP: __Yes __No
Taxpayer has provided T10 Pension Adjustment Reversal: __Yes __No
Other pension or registered plan income:__ Yes __ No
Are you electing to split eligible pension income: __ Yes __ No (Return must be filed by April deadline)

DONATIONS
Taxpayer made charitable donations and attached official receipts: __Yes __No
Taxpayer made charitable donations "in kind". Details attached on separate page:
Taxpayer made political contributions and donations slips are attached: __Yes __No

INVESTMENT INCOME AND DEDUCTIONS
T3 Income from Trust Allocations attached: __Yes __No
T600 Ownership Certificate (re: interest on bonds & other investment income attached: __Yes __No
T5 Statement of Investment Income attached: __Yes __No
T101 Statement of Resource Expenses attached: __Yes __No
T5013 Statement of Partnership Income attached: __Yes __No
Interest income earned but not yet received (e.g. strip bonds/coupon, Deferred annuities, compound interest bonds/GICs, etc.: **$** Is this the first year of the investment? ____Yes _____No
Interest paid to earn investment income:
Rental fee on safety deposit box (used to hold securities documents): $

Investment counseling, accounting and legal fees incurred to make investments: $		
Other investment income: $		
Investment Advisor: Name	Phone #	Email

INVESTMENTS DISPOSED OF (OR TRANSFERRED TO A TFSA) DURING THE YEAR (EG. withdrawal of a mutual fund) You may need to contact your investment advisor for information					
DESCRIPTION OF PROPERTY	**DATE ACQUIRED**	**DATE DISPOSED**	**SALES PROCEEDS**	**COST**	**EXPENSES OF DISPOSAL (E.G. COMMISSIONS PAID)**

OTHER INCOME, SELF-EMPLOYMENT, AND BUSINESS INCOME (Complete a T2 for corporate tax returns.)
Taxpayer was self-employed during the year and a self-employment statement is attached: __Yes __No
Taxpayer received professional fees and a statement is attached: __Yes __No
Taxpayer received director fees and a statement is attached: __Yes __No
T5018 Statement of Contract Payments (subcontractors) is attached: __Yes __No
Taxpayer had rental income and has attached a statement of income and expenses: __Yes __No
Taxpayer received income from a partnership either as cash or as a credit to a capital account in the partnership and a statement or tax slip is attached: __Yes __No
Other income: $

OTHER SELF-EMPLOYMENT EXPENSES
Taxpayer will claim home office expenses and provided support and details: __Yes __No
Taxpayer will claim automobile expenses and provide expenses and mileage: __ Yes __ No
Other:

TUITION AND EDUCATION				
T2202A Education Amount Certificate(s) is/are attached for **self:** __Yes __No				
DEPENDANT'S NAME	**EDUCATIONAL INSTITUTION**	**# OF MONTHS IN ATTENDANCE**	**TUITION FEES**	**DEPENDANT'S INCOME**
Student loan interest paid for Fed or Prov Gov't loans Amount: $				
T2202A Education Amount Certificate(s) is/are attached for dependant(s) for **transfer** to taxpayer: __Yes __No				
TL11A Tuition and Education Amounts – University Outside of Canada and **transfer** to taxpayer: __Yes __No				
TL11B Tuition Fees Certificate – Flying School or Club for taxpayer: __Yes __No				
Other (e.g. special education expenses for disabled dependant):				

MEDICAL, DISABILITY AND CAREGIVER EXPENSES & CREDITS
Taxpayer incurred medical expenses and has provided official receipts: __Yes __No
T2201 Disability Tax Credit Certificate provided: __Yes __No
Taxpayer will claim supplementary disability credit for child with severe disabilities or credit for supporting dependant child age 18 or over, or will use dependant relative's unused disability credit: Yes __No

Taxpayer will claim caregivers credit for providing in home care for elderly/infirm relative: __Yes __No
Taxpayer will claim a portion of medical expenses for disabled dependants: __Yes __No Amount: $
Taxpayer will claim medical expense supplement for low-income workers with higher than average eligible medical expenses: __ Yes ___NO
Taxpayer will claim Child Fitness credit (children under 16 or 18 if disabled) ___ Yes ___ No If yes attach receipts

MISC: OTHER EXPENSES, CLAIMS, INCOME, OR SUPPORT NOT INCLUDED ABOVE
Child care expenses to be claimed (provide details with supporting documentation): __ Yes __No
Spousal (not child) support payments paid or received (provide details of agreements and amounts paid) if claiming:
Make claim for GST/HST Credit: __Yes __No
Taxpayer will make claim for credit re: property tax or rent paid last year: __Yes __No If claiming, provide amounts and addresses for the year:
Taxpayer will make claim for moving expenses for job or education: __Yes __No If claiming, provide proof for reason, distances, expense amounts and addresses:
Home Buyer's Credit: Did you or your spouse/partner acquire a qualifying home after Jan 27, 2009? __Yes __No Did you or your spouse/partner own a home in this or the preceding 4 years? __Yes __No
MISC: OTHER DOCUMENTS
Taxpayer has provided receipts for 2010's tax installments or tax payments: __Yes __No
Taxpayer has provided Notice of Assessment received last year: __Yes __No
If a **new client**, taxpayer must provide copies of tax returns for the prior two years along with the corresponding Notices of Assessment from Canada Revenue Agency.
Letters from CRA:
Other documents provided:

TAX REFUND – DIRECT DEPOSIT
Taxpayer wants tax refund/credit deposited directly to his/her account: __Yes __No Taxpayer has provided a cheque marked "void" in order to provide banking information: __Yes __No

Consent:
The Client(s) authorize Kiel & Company Professional Corporation to use my/our personal information obtained for tax preparation in order to prepare my/our income tax return(s). I/we understand the manner in which my/our personal information will be collected and used.

Client acceptance and authorization signature:

Taxpayer ____

Date ____________________ Spouse ____
(required if spouse has no income)

COMPLETED TAX FORM PICKUP

IMPORTANT: You will be provided with a completed tax return summary. Please review it for accuracy and completeness and notify us of any questions that you have.