

PERSONAL TAX INFORMATION CHECKLIST - 2010

(If your spouse needs to complete one for herself / himself, please use a separate copy)

PERSONAL AND GENERAL INFORMATION

Name _____
 Address _____

 Marital status _____
 Date of birth (yyyy/mm/dd) _____
 Are you a Canadian citizen? _____
 Are you a U.S. citizen? _____
 Are you a U.S. green card holder / resident? _____
 Occupation / Employment _____
 Telephone for contact _____ Telephone-cell _____
 Email address _____

If you became or ceased to be a resident of Canada in 2010, please give the date of entry or departure (mm/dd) _____

Do you want us to notify Elections Canada for National Register of Electors? _____

Did you own or hold non-Canadian property at any time in 2010 with a total cost of more than CAN\$100,000? _____
 If yes, please provide details of where, the type and the value of your non-Canadian investments _____

Address to which you want your return sent (if different from above) _____

	Yes	No	Not Applicable
Do you require your return to be completed by a date prior to April 30?			
	_____	_____	_____
	If yes, please specify date:		_____
	_____		_____

Was your 2009 tax return assessed as filed?
 Please enclose a copy of the 2009 assessment. _____

Did you pay any Canadian tax installments in 2010?
 If yes, please indicate the amounts and dates paid and submit receipts. _____

Federal installments _____
 Quebec installments _____

Refunds and rebates:

If you are entitled to a refund, do you wish it to be deposited directly into your bank account? (Attach a voided personal check, indicate if this is to apply to income tax) _____

If you deduct expenses from employment income or as a partner you may be eligible for rebate of GST / HST paid for those expenses. _____

DEPENDANTS AND SPOUSE

	Yes	No	Not Applicable
Any new dependants? Dependants include spouse, child, parent, grandparents, brother or sister (including in-laws), aunt or uncle.	_____	_____	_____

Anyone no longer a dependant?	_____	_____	_____
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Please provide details of all your present dependants (attach a separate list if space is insufficient).

<u>Name</u>	<u>Relationship</u>	<u>Date of Birth</u> (yyyy/mm/dd)	<u>SIN</u>	<u>Net income</u> <u>of</u> <u>Dependant*</u>	<u>Amount</u>
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

* Net income of your dependants would include income such as salary, interest and dividend income less deductions such as RRSP contributions and moving expenses.

	Yes	No	Not Applicable
Are any of your dependants transferring unutilized tuition deductions to you?	_____	_____	_____

If yes, please attach Form T2202/T2202A or TL11A, TL11B and TL11C in respect of a dependant's attendance at college, university or other certified institution. This form should be signed by the student and the educational institution.

Child care expenses and child tax credit:

Did you receive any Universal Child Care benefit?	_____	_____	_____
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If yes, please indicate amount and attach Form RC 62

Did you pay child care expenses (those incurred to enable you or a supporting person to earn income from employment or self-employment, taking training courses or do research or similar work, including the cost of day care centers, baby-sitting services, day nursery services, day camps and boarding schools)?	_____	_____	_____
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If yes, please provide details (attach a separate list if space is insufficient). Receipts are required for Quebec tax purposes.

<u>Recipient's Name</u>	<u>SIN (if applicable)</u>	<u>Amount</u>
_____	_____	_____
_____	_____	_____

INCOME

	Amount	Information (Check, if attached)
<u>Employment income:</u>		
Employment income (T4, Releve 1)	_____	_____
Director's fees (T4, Releve 1)	_____	_____
Stock option (T4, Releve 1)	_____	_____
<u>Pension income:</u>		
Canada/Quebec Pension Plans benefits (T4A(P), Releve 2)	_____	_____
Old Age Security pension income (T4A(OAS), T4A(P))	_____	_____
U.S. Social Security payment (US Form 1099)	_____	_____
Other pension, retirement or annuity income including RRSP, DPSP, RRIF or IRA (U.S.) withdrawals (T4A, T4RSP, T4RIF, Releve 2, US Form 1099)	_____	_____
<u>Other income:</u>		
Provincial stock savings plan income	_____	_____
Scholarships, fellowships, bursaries, etc. received (T4A, Releve 1)	_____	_____
Partnership income (attach T5013 and / or K-1 (US))	_____	_____
Self-employment income (see Note 1 below and attach income and expense statement)	_____	_____
Farming income (see Note 2 below)	_____	_____
Rental income (attach income and expense statement)	_____	_____
Alimony or separation allowance income received pursuant to a written agreement	_____	_____
Employment Insurance benefits, maternity benefits (T4E)	_____	_____
Disability payments received (T4A, T5007, Releve 2)	_____	_____
Foreign source income	_____	_____
	_____	_____
Other income - please specify (e.g. executor fees) Do not include any GST / HST tax credit received	_____	_____
_____	_____	_____
_____	_____	_____

Note 1: If you deduct the costs of a workspace at your residence, which is not your principal place of business nor used on a regular basis to meet clients, indicate the amount (percentage) dedicated to business use

Note 2: If you have been using the cash method of accounting, please include the cash amount paid for inventory acquired and held at the end of the year.

DEDUCTIONS AND CREDITS

	Amount	Information (Check, if attached)
RRSP, DPSP, or other pension plan contributions Attach 2010 RRSP Contribution Limit Statement and contribution receipts	_____	_____
Alimony or separation allowance payments (see Note 1 below)	_____	_____
Professional or union dues	_____	_____
Provincial stock savings plan contributions	_____	_____
Commission expenses (attach signed Form T2200/TP64.3-V)	_____	_____
Moving expenses - move 40 km closer to new place of business (see Note 2 below)	_____	_____
Employment expenses - Automobile (see Note 3 below)		
Tuition fees paid (attach T2202A)	_____	_____
Charitable donations (attach receipts)	_____	_____
Non-reimbursed medical expenses for you, your spouse and dependants for 2009 and 2010 which have not previously been deducted (see Note 4 below and attach receipts)	_____	_____
Federal and provincial political contributions (attach receipts)	_____	_____
Adoption expenses Attach a list of expenses and date the adoption was finalized.	_____	_____
Disability tax credit (submit the Disability Credit Certificates, Form T2201 or TP-752.0.14 unless a previous certificate is still valid)	_____	_____
Attendant care expenses (see Note 5 below)	_____	_____
Public transit pass	_____	_____
Children's fitness or provincial activity tax credit Attach a list and provide details of name of dependants, provider and amounts.	_____	_____
Other deductions - please specify		
_____	_____	_____
_____	_____	_____

Note 1: Attach a copy of the written agreement unless previously provided. Alternatively, attach details of the name, address, and SIN of the recipient and the amount and frequency of payments.

Note 2: Non-reimbursed moving expenses are deductible and include travel cost, temporary board and lodging near either dwelling, lease cancellation costs, the cost of selling your old residence, legal fees and land transfer tax on the purchase of a new home if you sold an owner-occupied residence.

Note 3: If you are an employee and wish to claim automobile expenses, Form T2200/TP62 must be signed by your employer and included with your return. Please provide details of your automobile expenses, including any taxable allowances or reimbursements which you may have received.

Note 4: Medical expenses, including premiums paid by you to a private medical plan, greater than the lesser of 3% of net income or \$2,024 are eligible for credit.

Note 5: Attendant cares expenses incurred to enable you to work if you had a mental or physical impairment may be deductible. Form T2201 or TP-750.14 must be completed. If Form T2201 or TP-750.14 has already been filed, please indicate the form was filed. Please attach all receipts.

INVESTMENTS

	Yes	No	Not Applicable
Have you included all reporting forms, which indicate investments income (including T3, T5, Releve 3, T600, T600C, U.S. Form 1099 and any other forms which indicate your investment income)?	_____	_____	_____
Did you dispose of any treasury bills or other commercial paper?	_____	_____	_____
If yes, please attach Form T5008			
Did you have other investment income whether foreign or Canadian, for which reporting forms are available?	_____	_____	_____
If yes, please attach details of the payer's name, description, amount received and taxes withheld at sources. If the investment is foreign, please note the currency			

Carrying charges and interest expenses:

Did you incur any expenses to earn investment income (including accounting fees, safety deposit box charges, interest on bank loans or broker accounts, etc.)? Life insurance policy interest is deductible only if Form 2210 (TP163.1 for Quebec purposes) is filed and signed by you and your insurance company.	_____	_____	_____
If yes, please attach details of the expense, including the payee's name, description and the amount paid.			

Tax shelters:

Did you own tax shelters (e.g. MURBs, flow-through shares, films, etc.)?	_____	_____	_____
If yes, please attach any particulars relating to these investments (including number of units, income statements, bank letters or other statements which prove the amount of deductible interest expenses, etc.			

