

Exact Tax Service - Established 1978

www.exact-tax.ca e-mail: etservice1978@gmail.com f: Exact Tax Service
164 Rathburn Road, Etobicoke, Ontario, M9B 2L4 Tel: 416-621-2505

PERSONAL TAX INFORMATION CHECKLIST

PLEASE COMPLETE PAGE ONE AND TWO, PRINT, SCAN, EMAIL OR DROP OFF

Mr/Ms? _____ NAME: _____
(Family Name, Initial, First Name)

SIN: _____ DOB: _____ Marital Status: _____
(Single, Married, Common Law, Separated, Divorced)

Address: _____
Unit #, Building #, Street, City, Province, Postal Code, Country

Tel: _____ Cell: _____ Email _____

IF YOU MOVED DURING THE YEAR THE RENT/PROPERTY TAX RECEIPT(S) FOR THE PREVIOUS AND CURRENT ADDRESS(ES) ARE NEEDED TO CALCULATE THE ONTARIO TAX CREDITS.

Spouse/Partner Name: Mr/Ms? _____
(Family Name, Initial, First Name)

SIN: _____ DOB: _____

Tel: _____ Cell: _____ Email _____

Do you have any dependent? Child(ren) _____ Adult(s) _____

Name, M/F, DOB, SIN#

Name, M/F, DOB, SIN#

Did you, or Partner claimed the Disability Tax Credit (T2201) last year? Y/N _____

Did you had any Home Renovation to assist seniors or handicapped resident's?

If you are 65+ or a Student, please bring you Public Transportation Receipt(s)!

Are you a recent Immigrant Y/N? ___ If yes, your documented World Income is needed

Amount at Immigration? _____ Currency? _____

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How many of these listed information slips do you have?

T4 ____ T4A ____ T4E or RC210 ____ T4(P) ____ T4 (OAS) ____ T4 RRSP ____

T4 RRIF ____ T4 PS ____ T3 ____ T5 ____ T5006 or 7/8 ____ T5013 ____ RC62 ____

Do you have Tuition receipt(s) – T2202 or TL11? _____

Did your employer required you to work from home?

How many days did you work from home during the taxation year? _____

Did you receive a Foreign Pension or other Foreign Income? Y/N ___ if Yes, from which Country? _____ If from Germany, when was the first year? _____

Do you need to re-pay a Student Loan, or a Home Buyers (HBP) RRSP withdrawal, or a Life-Long-Learner (LLP) withdrawal Y/N? _____

Did you make any Non-registered accounts investment related transactions? _____

If yes, do you have a Realized Gains/Loss statement from your financial institution(s)

Did you pay any Financial planning, management, investment fees? _____

Did you borrow money to make investment profits? _____

Detailed statement of fees paid, and if you have a loan for investment purpose, a Statement showing the interest portion is needed!

Did you pay any Trade Union dues or Professional licencing/insurance fees? _____

Spousal or Child Support? _____ Did you make donation(s)? _____

Did you make any Federal/Provincial Political Contributions? _____

Do you pay for a Private Health Insurance Plan? Have receipts/summaries from Drugstore(s)? Do you have Doctor(s), Eye doctor, Dental or Denturist expenses? Did you purchase prescription glasses? Are you a Naturopath patient? Did you pay for any prescribed Medical Equipment (Cane, Walker, Wheelchair etc.)?

Are you Self-employed or have Professional, Commission or Royalty income? _____

Do you have rental income? _____

WE WILL HAVE TO SEE YOUR NOTICE OF ASSESMEN-REASSESSMENT FROM YOUR LAST FILED TAX RETURN! IT IS VERY IMPORTANT FOR ACCURATE TAX PREPARATION, AS IT CONTAINS CARRY-FORWARD INFORMATION FROM THE PREVIOUS YEARS.

LOOKING FORWARD MEETING YOU IN PERSON.

Klaus Theyer – Exact Tax Service