

Adams Heymen Owen Income Tax Checklist

Taxation Year _____

Name _____ DOB _____ SIN _____

Marital Status Married Single Widowed Divorced Separated Common-Law

Spouse _____ DOB _____ SIN _____

Address _____ City _____ Postal Code _____

I/We have moved since our last tax return was completed

Home _____ Cell _____

e-Mail _____

Names of Dependants	DOB	SIN
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

If you are a new client of ours, please include a copy of last year's tax return, including your most recent Notice of Assessment or Re-Assessment

- T3 Slips
- T4 Slips
- T4 A's
- T4 U's
- T5's / T600's
- T4RSP
- T4RIF

- CPP / OAS Benefits
- Foreign Income and Pensions
- Business/Farm/Rental Revenue and Expenses
- EI Benefits
- Universal Child Care Benefits

- T2202A (Tuition Fees)
- Donations
- RRSP Contributions
- Personal Tax Installments
- Union / Professional Dues
- Medical Receipts
- Moving Expenses (include ALL receipts, not just a spreadsheet)
- Child Fitness Tax Credit

Self-Employment / Business Income	
Sales/Gross Revenue	
Expenses:	
Accounting/Legal/Consulting	
Advertising	
Licenses/Dues/Fees	
Insurance	
Interest/Bank Charges	
Meals/Entertainment <i>(see below)</i>	
Salarais	
Travel	
Automobile <i>(see below)</i>	
Office <i>(see below)</i>	

Auto/Home Office/Entertainment Expenses	
Auto Expenses:	
Fuel	
Repairs/Maintenance	
Insurance/License/Registration	
Interest	
Leasing Cost	
KM's Driven	
For Business	
Total for Year	
Home Office Expenses:	
Heat	
Hydro	
Water	
Repairs/Maintenance	
Insurance	
Property Taxes	
Rent	
Mortgage Interest	
Utilities	
Other	
Square Footage	
For Business	
Total Home	
Entertainment	x 50%
Meals	x 50%

Rental Income	
Gross Rental Income	
Address of Rental	
Expenses:	
Property Taxes	
Maintenance/Repairs	
Mortgage Interest	
Insurance	
Utilities	
Other	
Co-Owner?	
Name	
SIN	
% of Ownership	
For Basement Suites:	
Square footage of suite: _____	
Square footage of house: _____	

Child Care Expenses	
Paid To:	Name
	Address

Amount	SIN

Employment Expenses	
Please attached your signed T2200	
Accounting/Legal	
Advertising/Promotion	
Automobile <i>(see left)</i>	
Meals/Entertainment <i>(see left)</i>	
Accomodation	
Office Expense <i>(see left)</i>	
Parking	
Supplies/Postage/Stationary	
Other	