

2009 PERSONAL INCOME TAX RETURN CHECKLIST

This checklist is designed to assist you in compiling the information necessary to prepare your 2009 personal tax return. Please return this completed form together with all relevant documentation to our office no later than **April 9, 2010** so that we can prepare and **E-File your return no later than 5:00 p.m. on April 30, 2010**. We cannot guarantee that returns received by our office after **April 23, 2010** will be completed and filed by the deadline date. It is imperative that you attend at our office no later than April 30th to sign your E-File Authorization Form.

Name: _____	Email: _____
Address: _____	Fax: _____
_____	Date of Birth: _____
Home Phone: _____	Marital Status: _____
Work Phone: _____	SIN: _____
Cell Phone: _____	

Dependents:

Name	Date of Birth	SIN	Income	Post Secondary School Information
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

	<u>Included</u>	<u>Details</u>
- 2008 NOTICE OF ASSESSMENT or REASSESSMENT	_____	_____
- Copy of T1 for 2008 (new clients only)	_____	_____

Please enclose **all original copies** of slips and receipts and **all supporting documentation** for the following:

<u>Income:</u>		
- Employment income - T4, T4A, T4PS	_____	_____
- Retirement income - T4A(OAS), T4A(P), T4A, T4RIF, T4RSP	_____	_____
- Investment income - T3, T5, T5013, T5008	_____	_____
- Other/Foreign income	_____	_____
- Universal Child Care Benefit - RC62	_____	_____
- Employment Insurance - T4E	_____	_____
- Rental income/expenses*	_____	_____
- Child support/Alimony amounts received	_____	_____
- Capital Gains/Losses – Stocks/Mutual Funds/Real Estate/Other	_____	_____
- Monthly statements	_____	_____
- Annual trading summaries	_____	_____
- Details of original cost and date purchased	_____	_____
- Income from self-employment - all revenues and expenses*	_____	_____

