



# PERSONAL INCOME TAX RETURN CHECKLIST

## Administrative

How would you like your tax return package delivered to you? Email Electronic (PDF)  Paper   
**We will be returning all original documents and receipts after preparation of your income tax return(s).**

## Basic Information - complete ONLY if there were changes

Name: \_\_\_\_\_  
SIN: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: (     ) \_\_\_\_\_  
Email: \_\_\_\_\_

## Spouse's Information

Name: \_\_\_\_\_  
SIN: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Address : \_\_\_\_\_  
*(If different)* \_\_\_\_\_  
Phone: (     ) \_\_\_\_\_  
Email: \_\_\_\_\_

Marital Status as at December 31  
Single  Separated   
Married  Common Law   
Divorced  Widow

Spouse's net income: \_\_\_\_\_  
*(Provide only if spouse T1 not prepared by Smythe - line 236 on page 3 of his/her tax return)*

Marital status changed during the year? Yes  No

If yes - date of change: \_\_\_\_\_

Do you, your spouse or any of your dependents qualify for the Disability Tax Credit? Yes  No   
If yes, provide the legal name of the person: \_\_\_\_\_

## Dependent information

Name	SIN	Date of Birth (YY-MM-DD)	Relationship	Email/Phone
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

## Residency

You are a Canadian citizen Yes  No   
You are a U.S. citizen or green card holder Yes  No

Did you become (or cease to be) a resident of Canada for tax purposes during the year? Yes  No   
If yes, date of entry/departure: \_\_\_\_\_

As a Canadian citizen, can the CRA provide your name, address, date of birth and citizenship to Elections Canada? Yes  No

Do you want your tax refund deposited directly to your bank account Yes  No

**Information to provide**

**Canadian and Foreign Sources of Income**

Employment (T4) \_\_\_\_\_  
 Employment insurance (T4E) \_\_\_\_\_  
 Pension, retirement, annuity and other income (T4A) \_\_\_\_\_  
 Old Age Security (T4A(OAS)) \_\_\_\_\_  
 CPP/QPP (T4A(P)) \_\_\_\_\_  
 RRSP, PRPP, DPSP, RPP, RRIF (T4RSP/T4RIF) \_\_\_\_\_  
 Investment income (T5) \_\_\_\_\_  
 Mutual funds/estates/trusts (T3) \_\_\_\_\_  
 Partnership income (T5013) \_\_\_\_\_  
 Support payments received \$ \_\_\_\_\_  
 Interest on loans receivable \$ \_\_\_\_\_  
 Stock Options *Please provide agreements*

**Deductions and Credits**

Interest paid on student loans \$ \_\_\_\_\_   
 Union/professional membership dues \$ \_\_\_\_\_   
 Child care expenses \$ \_\_\_\_\_   
 Adoption expenses \$ \_\_\_\_\_   
 Moving expenses \$ \_\_\_\_\_   
 Accounting/legal/investment counsel fees \$ \_\_\_\_\_   
 Interest paid to earn investment income \$ \_\_\_\_\_   
 Spousal support payments \$ \_\_\_\_\_   
 Child support payments \$ \_\_\_\_\_   
 Charitable donations \$ \_\_\_\_\_   
 Political/municipal contributions \$ \_\_\_\_\_   
 RRSP contributions \$ \_\_\_\_\_   
 Home Buyers Plan withdrawals or repayments \$ \_\_\_\_\_   
 Lifelong Learning Plan withdrawals or repayments \$ \_\_\_\_\_   
 First time homebuyer   
 Tuition fees (T2202A)   
 Flow through shares(T101)   
 Nursing home/attendant care costs \$ \_\_\_\_\_   
 Medical/other paid disability expense *(net of reimbursements from extended benefit plan)* \$ \_\_\_\_\_

Other sources of income (please provide details):

\_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_

Other expenses/deductions/credits (please provide details):

\_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_

**The following schedules are provided in the following pages. Complete the applicable schedules or provide the necessary documents**

- Schedule 1: Employment expenses
- Schedule 2: Business/professional income/expenses
- Schedule 3: Vehicle expenses (for Business & Employment)
- Schedule 4: Home office expenses (for Business & Employment)
- Schedule 5: Rental Property
- Schedule 6: Sale of Real Estate
- Schedule 7: Sale of Investments/Assets (other than real estate) - not including RRSP, TFSA or other registered plans
- Schedule 8: Foreign Investments (foreign property/assets with a total cost greater than Canadian \$100,000?)

**Schedule 1**  
**EMPLOYMENT EXPENSES**  
Expenses you are required by your employer to pay to earn employment income which have not been reimbursed.

Your employer should provide you with T2200-Declaration of Employment Conditions. Please include a signed copy and keep one on file.

Did you earn commissions, salary or both?

Commission   
Salary   
Both

Travel \$ \_\_\_\_\_  
Parking \$ \_\_\_\_\_  
Supplies (stationery, other) \$ \_\_\_\_\_  
Telephone \$ \_\_\_\_\_  
Salaries paid to an assistant \$ \_\_\_\_\_  
Office rent \$ \_\_\_\_\_  
Accounting & legal\* \$ \_\_\_\_\_  
Advertising & promotion\* \$ \_\_\_\_\_  
Meals & entertainment\* \$ \_\_\_\_\_  
Rental of office equipment\* \$ \_\_\_\_\_  
Training\* \$ \_\_\_\_\_  
Vehicle expenses Complete Schedule 3  
Home office expense Complete Schedule 4  
Other (please provide details): \$ \_\_\_\_\_

*\* Applies to commission employees only.*

**Schedule 3**  
**VEHICLE EXPENSES (used for Business/Employment)**

**If purchased, leased or sold in the year, include relevant agreements.**

Year & make of vehicle \_\_\_\_\_  
Purchase/sale price \_\_\_\_\_  
Date of purchase/sale \_\_\_\_\_  
Date lease began/ended \_\_\_\_\_

Kms driven for business purposes \_\_\_\_\_  
Total Kms driven \_\_\_\_\_

**Expense**

Fuel \$ \_\_\_\_\_  
Repairs & maintenance \$ \_\_\_\_\_  
Insurance \$ \_\_\_\_\_  
Licensing & registration fees \$ \_\_\_\_\_  
Loan interest \$ \_\_\_\_\_  
Lease payments \$ \_\_\_\_\_  
Parking \$ \_\_\_\_\_  
Other \_\_\_\_\_ \$ \_\_\_\_\_  
Other \_\_\_\_\_ \$ \_\_\_\_\_

**Schedule 2 - complete for each separate business**  
**BUSINESS (Self-employed) INCOME & EXPENSES**

Name of business (other than personal name) \_\_\_\_\_

Type of business \_\_\_\_\_

Did you generate income from a website? Yes  No

If yes, please provide:  
Website address: \_\_\_\_\_  
Website address: \_\_\_\_\_  
% of Gross income earned from websites \_\_\_\_\_ %

Did you have partners in your business?  
If yes, please provide:

Partner Name	SIN	% Owned
_____	_____	_____
_____	_____	_____

GST business number \_\_\_\_\_

Are we preparing your GST return? Yes  No

	Pre-GST	GST	Total
<b>Revenue</b>	\$ _____	\$ _____	\$ _____
<b>Expenses</b>	\$ _____	\$ _____	\$ _____
Advertising	\$ _____	\$ _____	\$ _____
Meals & entertainment	\$ _____	\$ _____	\$ _____
Bad debts	\$ _____	\$ _____	\$ _____
Insurance	\$ _____	\$ _____	\$ _____
Interest & bank charges	\$ _____	\$ _____	\$ _____
Licenses, dues, memberships & subscriptions	\$ _____	\$ _____	\$ _____
Office expenses	\$ _____	\$ _____	\$ _____
Accounting, legal & other professional fees	\$ _____	\$ _____	\$ _____
Rent	\$ _____	\$ _____	\$ _____
Repairs & maintenance	\$ _____	\$ _____	\$ _____
Salaries	\$ _____	\$ _____	\$ _____
Travel	\$ _____	\$ _____	\$ _____
Telephone	\$ _____	\$ _____	\$ _____
Other:	\$ _____	\$ _____	\$ _____
Other:	\$ _____	\$ _____	\$ _____
Other:	\$ _____	\$ _____	\$ _____
Vehicle expenses			Complete Schedule 3
Home office expenses			Complete Schedule 4
<b>Capital equipment purchases (computer, desk, etc)</b>			
Item	Pre-GST	GST	Total
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____

**Schedule 4**  
**HOME OFFICE (for Business & Employment)**

Total square footage of area used for business? \_\_\_\_\_  
Total square footage of home? \_\_\_\_\_

Utilities (Heat/Hydro/Water)	\$ _____
Repairs & maintenance	\$ _____
Insurance	\$ _____
Property tax	\$ _____
Internet (cable excluded)	\$ _____
Rent	\$ _____
Mortgage interest	\$ _____
Other	\$ _____

**Real Estate - Please complete the following schedules for each property**

Did you change the use of a property during the year (rental to personal use or vice versa)?

Yes  No

If yes, we will contact you. We will need the address, date of change, and possibly the fair market value on the date of change.

**Schedule 5**  
**RENTAL PROPERTY**

Was the property used for short-term rentals (Airbnb)? Yes  No

Did you own the property with partners? If yes, please provide:  
Partner Name SIN % Owned

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**Include the Statement of Adjustments if purchased in the year**

Address \_\_\_\_\_

Rental income \$ \_\_\_\_\_

**Expenses**

Advertising \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Mortgage interest \$ \_\_\_\_\_

Office expenses \$ \_\_\_\_\_

Accounting, legal & other professional fees \$ \_\_\_\_\_

Management & administration/strata fees \$ \_\_\_\_\_

Repair & maintenance \$ \_\_\_\_\_

Salaries, wages & benefits \$ \_\_\_\_\_

Property taxes \$ \_\_\_\_\_

School Taxes \$ \_\_\_\_\_

Travel \$ \_\_\_\_\_

Utilities \$ \_\_\_\_\_

Other \_\_\_\_\_ \$ \_\_\_\_\_

**Major renovations & purchases (ie: appliances)**

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

**Schedule 6**  
**SALE OF REAL ESTATE**

Was the property ever your principle residence? Yes  No  *If yes, we will contact you.*

Did you own the property with partners? If yes, please provide:  
Partner Name SIN % Owned

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**Include the Statement of Adjustments for BOTH the sale and purchase OR**  
**If the statements are not available, complete the remaining schedule as follows:**

Address \_\_\_\_\_

**Date Purchased** \_\_\_\_\_

Purchase price \$ \_\_\_\_\_

Property transfer tax \$ \_\_\_\_\_

Legal costs paid on purchase \$ \_\_\_\_\_

Additions and/or major improvements  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_

**Date Sold** \_\_\_\_\_

Sale price \$ \_\_\_\_\_

Legal costs paid on sale \$ \_\_\_\_\_

Commission paid on sale \$ \_\_\_\_\_

Other \_\_\_\_\_ \$ \_\_\_\_\_

Other \_\_\_\_\_ \$ \_\_\_\_\_

Other \_\_\_\_\_ \$ \_\_\_\_\_

**Schedule 7**  
**SALE OF INVESTMENTS AND ASSETS (OTHER THAN REAL ESTATE) (Not including investments held in your RRSP, TFSA or other registered plans)**

Sale of investments includes: shares, conversion of loans/notes to shares, sale of cryptocurrency, share for share exchanges, etc.

Investment advisor contact information:  
Advisor's Name: \_\_\_\_\_  
Financial Institution: \_\_\_\_\_  
Phone #: \_\_\_\_\_  
Email: \_\_\_\_\_

**Option 1: Please provide the following documents for ALL NON-RRSP or NON-registered plans:**

1: December 31st investment statements  
2: Realized gain/loss report covering the period from Jan to Dec, OR  
Brokers' statement for both purchases and sale (only if realized gain/loss report is not available)

**Option 2: For self-managed investment accounts or if the above information is not available, please provide information in the format below:**

Name of Stock	Purchase Date MM / DD / YY	Sale Date MM / DD / YY	US \$ (Y/N)	Shares Sold #	Sale Proceeds \$	Commissions \$	Cost of Shares \$
_____	___/___/___	___/___/___	_____	_____	_____	_____	_____
_____	___/___/___	___/___/___	_____	_____	_____	_____	_____
_____	___/___/___	___/___/___	_____	_____	_____	_____	_____

**Schedule 8 FOREIGN INVESTMENTS**

At any time in the year, did you own foreign property/assets with a total cost greater than Canadian \$100,000?  
If your investments include shares held with your investment advisor, you will receive appropriate reporting information from your advisor. Provide this information to us.  
If your investments are not held with your investment advisor, you will need to provide further details. For assistance, refer to the attached excerpt of Form T1135.

Did you own shares of a foreign corporation during the year (outside of your investment account(s))? If yes, please provide the following:  
Name of corporation \_\_\_\_\_  
Country of residence \_\_\_\_\_  
% of Shares owned \_\_\_\_\_