



Personal Tax Checklist


Part 1 of 4 – Personal Information

1. Are you a first-time client to PTC Canada?
2. If you are a first-time client, how did you find out about PTC Canada? (referred, where, when, how?)
3. Tax years to be filed (we recommend doing a separate checklist for each year to be filed)
4. Full legal name (as on social insurance card) and the name you used in the tax year filed (i.e. Cameron John Smith, Cam; or Susan Ashley Brown, Sue)
5. Current residential mailing address. If moving soon, use new address.
6. Home telephone number. Also, work, pager, cell, and other contact numbers. Please include e-mail addresses, fax numbers, and web addresses, if applicable.
7. Marital status. If married or common law and not filing together, please include your spouse's first name, social insurance number, and net income (line 236 of their return).
8. Your social insurance number
9. Your date of birth in the following format: day/month/year
10. Were you or your spouse self-employed at any time this tax year? If yes, in which province?
11. Were you involved in bankruptcy? If yes, please state entrance and/or discharge date.
12. Is the taxpayer deceased? If yes, please state date of death. Please also provide details of legal hearings, proceedings, etc.
13. Did you leave or re-enter Canada this year? If so, please provide departure and/or entrance date(s).
14. Do you wish to have your name added to the voters' list through your tax return?
15. Are you applying for the GST credit?
16. Do you have any children/dependants under 19 or 19 and older certified infirm by a doctor? If yes, please state their full legal name(s), social insurance number(s), and net income (line 236 of their return). If they require a tax return completed by us, please have them use a separate PTC Canada checklist.
17. Do you own foreign property worth over \$100,000 Canadian?
18. Please tell us any other personal information we may need.

Part 2 of 4 – Income

What are the sources of your income? Please note, this includes income from all over the world, not just Canada.


1. Employment
2. Sales or commissions
3. Odd jobs, casual labour, tips
4. Old Age Security Pension
5. Canada or Quebec Pension Plan
6. Other pensions or superannuation
7. Disability benefits
8. Employment insurance benefits
9. Taxable dividends from Canadian corporations
10. Interest or investment income
11. Income/losses from a limited/non-active partnership
12. Taxable capital gains
13. Support payments received
14. RRSP income
15. Workers' compensation income
16. Social assistance
17. Net Federal Supplements
18. Did you start, participate in, or end a business(es), rental property(ies), farm(s), fishing operation(s), or profession(s) of which you were either a sole proprietor, partner, or co-owner? If yes, please click on the appropriate items and state the applicable partners' names, social insurance numbers, mailing addresses, and percentage of activity level (from 1% to 99%).
19. Foreign income
20. Any other income we need to know about.

 **Please note:** If you had income but were not issued a T-slip for it, you must discuss this with the issuer. **As a taxpayer, you, not your income provider, PTC Canada, or CRA, are ultimately responsible for researching, tabulating, and reporting all your income.**

Part 3 of 4 – Deductions from Income

Which of the following deductions apply to you?

1. Registered Pension Plan contributions not on T4 slips
2. RRSPs
3. Saskatchewan Pension Plan
4. Annual union or professional dues
5. Universal Child Care Benefit (UCCB) repayment
6. Child care expenses
7. Child fitness tax credit
8. Attendant Care expenses
9. Live-in dependants under 18 or over 65
10. Business investment losses
11. Moving expenses or any carried over from last year
12. Spousal or child support payments made
13. Carrying charges and interest expenses
14. Exploration and development expenses
15. Authorized employment expenses
16. Cleric's residence deduction
17. Canadian Forces personnel and police deduction
18. Canada employment amount
19. Employee home-relocation deduction
20. Stock options and shares deductions
21. Limited losses of other years' deductions
22. Non-capital losses of other years
23. Net capital losses of other years
24. Capital gains deductions
25. Northern residence deduction
26. Disability claim
27. Interest paid on student loan this year and interest paid in previous years not claimed
28. Tuition amounts claimed by student/taxpayer and any amount carried over from previous years
29. Tuition amount transferred by parent
30. Amounts transferred from your spouse
31. Medical expenses not covered by a drug plan
32. Public transit passes
33. Donations not claimed up to 5 years
34. Tax paid by instalments in advance
35. Federal or provincial tax credits
36. Losses or any other deductions carried over from last year
37. Any other deduction you feel we should know about

 **Please note:** All deductions claimed by the taxpayer are subject to CRA approval. *You, the taxpayer, must pursue all rejected or disputed deductions at your own expense. PTC Canada assumes no responsibility or liability for rejected or disputed deductions.*

Part 4 of 4 – Miscellaneous

A. For the completion of your return, please review the following:

1. Would you like direct deposit of your refund, GST payment, or child tax benefits?
2. Are you planning to enclose any payment to CRA with this return?

B. One of the services PTC Canada offers is assistance with negotiations with CCRC and any challenges you may face with your taxes. All answers to the following questions will be kept strictly confidential! If you would prefer to speak to us directly, please indicate.


1. Do you currently have a debt outstanding with CRA that you would like to discuss?
2. Do you currently have any outstanding issues with CRA?
3. Have you ever been audited? If yes, how many times and when? Please provide details.

C. PTC Canada's growth has been largely due to clients referring their friends, family, and associates. PTC Canada pays referral bonuses and awards discount fees upon completion of a new client's return. We invite you to take advantage of this.

1. Do you know someone who might require our assistance or services? If yes, please provide name, phone number, relationship, and details. May we use your name when contacting this person?

D. Please enclose the following information with these documents and all your receipts:

- a) Last year's tax return
- b) Last year's notice of assessment
- c) Signed consent form (T1013). If you do not have this, we can provide it.
- d) Spouse's or common law spouse's tax information
- e) Dependents' tax information
- f) Anything else you feel we should know about

 **Please note:** Tips on this form or webpage are for information only and are not legal advice. Those seeking legal advice must obtain counsel from professionals practicing in that field. **PTC Canada will not be held responsible for any liability incurred by anyone using this information form or webpage.**