

Choquette & Company Accounting Group Incorporated

Phone: (604) 463-8202
Toll-Free: 1-800-667-9254

2005 Personal Income Tax Checklist

Use this checklist to assist you in the gathering of the required information for us to prepare your 2005 Personal Income Tax return

Mr. Mrs. Ms.: _____ Social Insurance Number: _____ - _____ - _____

Address: _____

Postal Code: _____ Phone: (____) _____ Marital Status: Single Married Separated Divorced Widowed

Birth Date (yy/mm/dd): _____

SPOUSE'S INFORMATION:

Mr. Mrs. Ms.: _____ Social Insurance Number: _____ - _____ - _____

Address: _____

Postal Code: _____ Phone: (____) _____ Birth Date (yy/mm/dd): _____

DEPENDENTS:

Dependant 1: _____ Birth Date (yy/mm/dd): _____ SIN No.: _____ - _____ - _____

Dependant 1: _____ Birth Date (yy/mm/dd): _____ SIN No.: _____ - _____ - _____

| Sources of Income | | |
|-------------------|---------------------------------|---|
| √ | Type of Income | Documentation/Information Required |
| | Wages, Salaries and Commissions | T4, T4A slips, (available from employer). |
| | Pension Income | T4A(OAS), T4AP slips, (issued by Government of Canada). |
| | RRSP withdrawals | T4RSP slips, (issued by financial institution where withdrawal occurred). |
| | Unemployment insurance benefits | T4E slips, (issued by Revenue Canada). |
| | Investment income | T3, T5, T600 slips, (issued by financial/investment institution where investment is held). |
| | Canada Savings Bonds | Series No., Face Value, Interest Rate, Purchase & Maturity dates. |
| | Long Term Investments | Purchase date, Historical cost, maturity date, interest rate. |
| | Treasury Bills | T-BD form and purchase costs. |
| | Realized Taxable capital gains | Details of cost, sale price & commission. <i>You can download this form from TaxByFax.ca</i> |
| | Rental Income | Details on property as well as detailed listing (or receipts) for income and expenses for each property. <i>You can download this form from TaxByFax.ca</i> |
| | Self-Employment | Details on income and expenses. <i>You can download this form from TaxByFax.ca</i> |
| | Limited Partnership income | T5013 slip, (provided by limited partnership). |
| | Workers' compensation income | Details (usually in letter form). |
| | Income outside Canada | Details pertaining to income, (Source and amounts in foreign currency). |
| | Alimony/Child support | Amount received during year. |

Check us out on the Internet: ChoquetteCo.com or TaxByFax.ca for Tax by Fax instructions

Important
Phone today to book your in-home appointment
or to use our Tax By Fax service.

↪↪↪ Turn over for Deductions, Tax Credits and Other Info ↪↪↪

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| Deductions and Tax Credits | | |
|----------------------------|---|--|
| √ | Type of Deduction/Tax Credit | Documentation/Information required |
| | Retirement Savings Plan (RRSP) contribution | Official receipts, (issued by institution where contribution was made). Also allowable RRSP contribution (available from your 2004 Tax assessment notice). |
| | Professional and/or union dues | Union issued receipts or T4 slip. |
| | Charitable donations | Official Tax Receipts. |
| | Medical, dental, eye glass expenses | Receipts for any twelve-month period ending within 2005 (and not previously claimed). |
| | Educational deduction | Form T2202 |
| | Tuition fees / Student loan interest | Receipts. |
| | Child care expenses | Name, address and social insurance number of person paid as well as amounts paid. |
| | Unemployment insurance repayment | Details, (normally from T4E slip). |
| | Moving expenses | Details of expenses. <i>You can download this form from TaxByFax.ca</i> |
| | Commission expenses | Details of expenses. <i>You can download this form from TaxByFax.ca</i> |
| | Alimony/Child Support | Name and address of payee as well as amount. |
| | Interest and carrying charges | Details, (invoices or receipts). |
| | Safety deposit box | Amount paid, (receipt or bank statement). |
| | Disability deduction | Form T2201. |
| | Employment expenses | Original employment expenses. <i>You can download this form from TaxByFax.ca</i> |
| | B.C. tax credit | Political donation/WOF (Working Opportunity Fund) receipts and/or details. |
| | Losses during the year | Details including complete purchase and sale information (dates and values). |

| Other Information | | |
|-------------------|---------------------------------------|--|
| √ | Type | Documentation/Information required |
| | 2005 installment payments | Latest installment notice received from Revenue Canada. |
| | Losses from previous years | Details, (previous years tax return should contain a carry forward schedule). |
| | Prior years assessments/reassessments | Assessment/reassessment notice |
| | Refund for 2004 taxation year | Notice attached to Revenue Canada cheque, (interest income may be applicable). |

Check us out on the Internet: ChoquetteCo.com or TaxByFax.ca for Tax by Fax instructions

Should you experience any problems in gathering any of the above information, please contact our office. We look forward to seeing you during the 2005 income tax season.

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