

Individual Income Tax Return Checklist

Your Name:
Contact Number:
Home Address:
Postal Address:
Date of Birth:
Occupation
Email:

	Y	N	N/A	Attached	Comment
INCOME					
<i>Have you received all of your:</i>					
Payment Summaries (formerly known as Group Certificates)?					
Eligible Termination Payment Statements?					
Pension or annuity Statements? Specify what the undeducted purchase price (if known)					
INTEREST					
<i>Did you receive any interest from bank accounts or other investments?</i>					
<i>Did you receive any income from investments or income producing assets?</i>					
RENTAL/INVESTMENT PROPERTIES					
<i>Do you have a rental property?</i>					
If yes, provide information detailing:					
Rent received					
Interest paid					
Deductions for each property					
Assets purchased for the property (e.g. furniture, etc) including cost, date of purchase and description					
<i>Did you sell any rental or investment properties this year?</i>					
If yes, provide:					
Sale Contract					
Statement of Settlement					
DEDUCTIONS					
<i>Provide us with any information relating to expenses you believe to be deductible.</i>					

