

# QUADRI & SMITH LLP

CHARTERED PROFESSIONAL ACCOUNTANTS

P: 905-404-9316

464 Kingston Rd W, Ajax, ON, L1T 3A3

CLIENT NAME(S): \_\_\_\_\_

ADDRESS (If changed): \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

PERSONAL INCOME TAX FOR THE YEAR \_\_\_\_\_

- |  |   |
|--|---|
| <input type="checkbox"/> Notice of Assessment                              | <input type="checkbox"/> Educator Supplies Receipts – Max \$1000  |
| <input type="checkbox"/> T4 Slips (Employment)                             | <input type="checkbox"/> Student rent receipts  |
| <input type="checkbox"/> CERB (Canada Emergency Recovery Benefits)         | <input type="checkbox"/> Professional or union dues slips   |
| <input type="checkbox"/> T3 Slips (Investments)                            | <input type="checkbox"/> Childcare receipts/expenses  |
| <input type="checkbox"/> T5 Slips (Investments)                            | <input type="checkbox"/> Interest expense receipts  |
| <input type="checkbox"/> Old Age Security, CPP, T4E slips                  | <input type="checkbox"/> Automobile and travel expenses   |
| <input type="checkbox"/> T4A (Pensions), T4RIF, T4RSP slips                | <input type="checkbox"/> Home Office Expenses (Declaration of Conditions of Employment Form T2200S or Form T2200) |
| <input type="checkbox"/> RRSP receipts to December 31st                    | <input type="checkbox"/> Property taxes and rent paid   |
| <input type="checkbox"/> RRSP receipts 1st 60 days of new year             | <input type="checkbox"/> Student Loans Interest Paid  |
| <input type="checkbox"/> Mutual Fund Statements-December 31st              | <input type="checkbox"/> Medical and Dental Receipts  |
| <input type="checkbox"/> Alimony or separation allowances paid or received | <input type="checkbox"/> Tuition Form T2202A  |
| <input type="checkbox"/> Rental Income and expense details                 | <input type="checkbox"/> Tuition Form T11s Foreign Student  |
| <input type="checkbox"/> Business/Professional Income and expense details  | <input type="checkbox"/> Charitable donation receipts   |
| <input type="checkbox"/> Limited Partnership statements (T5013)            | <input type="checkbox"/> Political donation receipts  |
| <input type="checkbox"/> T5007, WCB or Social Assistance Income slips      | <input type="checkbox"/> Moving Expenses  |
| <input type="checkbox"/> Sale of Principal residence and other real estate | <input type="checkbox"/> Tax Installment receipts   |
|  | <input type="checkbox"/> Stocks: Year end trading summary   |
|  | <input type="checkbox"/> Legal bills (pension or spousal support)   |