

SADLER WEISMILLER GROUP, CA's

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www.sadlerweismiller.ca

Personal Income Tax Return Checklist

Name: _____

Address: _____

Email: _____

Spouse: _____

Phone: Hm: _____

Wk: _____

Fax: _____

Cell: _____

Dependant Children (incl. Date of Birth)

Information slips:

Employment (T4)

Pension (T4A)

CPP/Old Age Security (T4A(P))/(OAS)

Unemployment Insurance (T4U)

Dividends (T5)

Interest (T5)

RRSP, DPSP, RPP, RRIF

Estates/ Trusts / Mutual funds (T3)

Partnerships/Tax Shelters (T5013/T101)

Other T slips _____

Universal Child Care Credit

Receipts for the following:

RRSP contributions

Union / professional dues

Moving Expenses

Accounting / legal fees

Investment counsel fees

Safety deposit box rental

Interest paid on investment loans

Tuition fees / education deduction

Unreimbursed Medical / attendant care

Disability - Self or family member

Charitable / Political donations

Student Loans

Childcare expenses

Caregiver amount

***Transit Credit

***Child Fitness Credit

***See Additional Information Sheet For These New Credits or Go To:

WWW.CRA.GC.CA

for information on any questions you may have regarding other documentation you may require.

Other information or questions that could effect your return: (use the back of the page if required)

PLEASE RETURN THIS COMPLETED PAGE

TO SADLER WEISMILLER GROUP WITH YOUR PERSONAL TAX RETURN.

To make an appointment, please call Reception at 604-594-0094