

# STEWART & ASSOCIATES

CERTIFIED GENERAL ACCOUNTANTS

512 - 40 Ave. NW, Calgary, Alberta T2K 0E6 Telephone (403)261-0777 Fax (403)509-0425 www.stewartandassociates.ca

## PERSONAL TAX ORGANIZER

<b>Name</b>						
<b>Address</b>						
	<b>City</b>				<b>Postal Code</b>	
	<b>Prov</b>					
<b>Date of Birth (YYYY/MM/DD)</b>				<b>SIN#</b>		
<b>Phone</b>	<b>(Home)</b>				<b>E-mail</b>	
	<b>(Cell)</b>				<b>Contact Name</b>	
<b>Year to be completed</b>				<b>Province of Residence</b>		
<b>Marital Status (Circle One)</b>	married	common-law	widowed	divorced	separated	single

Change of address from prior year?  Yes  No

Change in Marital Status from prior year?  Yes  No

Change of name from prior year?  Yes  No

Would you like to receive communication via E-mail?  Yes  No

Have you included a copy of prior years Notice of Assessment from CRA? (If no, please provide)  Yes  No

Is this the first year we are preparing your personal tax return? (If yes, please provide previous year tax return)  Yes  No

Does Stewart and Associates complete your corporation's T2 Tax Returns?  Yes  No

Company Name: \_\_\_\_\_

Do you hold investments or real estate property outside Canada with an original cost in excess of \$100,000 CDN?  Yes  No

# PERSONALIZED TAX CHECKLIST

## Spouse Information:

<b>Name</b>		
<b>Phone</b>	(Home)	
	(Cell)	
<b>SIN #</b>		
<b>Date of Birth</b> (YYYY/MM/DD)		
<b>Net Income</b> (If not filed by S&A)		

## Dependent Information:

<b>Name</b>	<b>Relation</b> (Son/Daughter)	<b>DOB</b> (YYY/MM/DD)

## INCOME:

- |                          |             |                             |                          |              |                              |
|--------------------------|-------------|-----------------------------|--------------------------|--------------|------------------------------|
| <input type="checkbox"/> | <b>T4</b>   | <b>Employment Income</b>    | <input type="checkbox"/> | <b>T4A</b>   | <b>(OAS) Old Age Pension</b> |
| <input type="checkbox"/> | <b>T4AP</b> | <b>Canada Pension</b>       | <input type="checkbox"/> | <b>T4A</b>   | <b>Pensions</b>              |
| <input type="checkbox"/> | <b>T4E</b>  | <b>Employment Insurance</b> | <input type="checkbox"/> | <b>T5</b>    | <b>Interest</b>              |
| <input type="checkbox"/> | <b>T3</b>   | <b>Trust Income</b>         | <input type="checkbox"/> | <b>T4RSP</b> | <b>Redeemed RRSP</b>         |

## DEDUCTIONS:

- |                          |   |                          |  |
|--------------------------|---|--------------------------|--|
| <input type="checkbox"/> | <b>RRSP's</b>                                       | <input type="checkbox"/> | <b>Union Dues</b>  |
| <input type="checkbox"/> | <b>Child Care</b>                                   | <input type="checkbox"/> | <b>Allowable Business Losses</b>                                   |
| <input type="checkbox"/> | <b>Moving Expenses</b>                              | <input type="checkbox"/> | <b>Alimony or Support</b>  |
| <input type="checkbox"/> | <b>Self-employment Expenses</b>                     | <input type="checkbox"/> | <b>Rental Expenses</b>   |
| <input type="checkbox"/> | <b>Employment Expenses</b><br>(requires form T2200) | <input type="checkbox"/> | <b>Carrying Charges</b><br>(Safety Deposit Box, Interest Expenses) |

## NON-REFUNDABLE TAX CREDITS:

- |                          |                             |                          |   |
|--------------------------|-----------------------------|--------------------------|---|
| <input type="checkbox"/> | <b>Disability deduction</b> | <input type="checkbox"/> | <b>Public Transit Amount</b>                  |
| <input type="checkbox"/> | <b>Medical Expenses</b>     | <input type="checkbox"/> | <b>Charitable Donations</b>                   |
| <input type="checkbox"/> | <b>Child Fitness Credit</b> | <input type="checkbox"/> | <b>Interest on Student Loans</b>              |
|                          |                             | <input type="checkbox"/> | <b>Tuition Fees</b><br>(requires form T2202A) |

## OTHER FORMS:

- |                          |              |  |
|--------------------------|--------------|--|
| <input type="checkbox"/> | <b>T776</b>  | <b>Real Estate Rentals</b>                 |
| <input type="checkbox"/> | <b>T777</b>  | <b>Employment Expenses</b>                 |
| <input type="checkbox"/> | <b>T2125</b> | <b>Business or Professional Activities</b> |

(Please ask our professionals for a detailed worksheet if these forms apply to you)