

IMPORTANT NOTICE

*There have been changes to rules around trusts and requirements to file trust returns.
Any arrangement where beneficial ownership is separated from legal ownership should be considered.
Common examples include:*

- *Being on title for a child or parents' home for financing or estate planning purposes*
- *Having joint bank accounts with a parent or child for estate planning purposes*
- *Having investment accounts 'in trust' for a child or grand child*
- *Do you have an arrangement in place with a family member, corporation, or related party where you are holding an asset in trust for them?*
- *Do you have an asset in your personal name that was paid for using corporate funds?*

If you believe that any of the above may apply to you, you may have a filing requirement, please contact us to discuss.

Personal Tax Checklist

Tax Year: _____

Complete this T1 checklist and include it and all applicable slips, receipts, and other supplemental information required.

Paper: Documents can be dropped off at our office at 680 Waterloo Street, London ON.

Portal: Login to your portal at <https://wilkinsonrogers.cchifirm.ca/clientportal/account/logon>
If you would like a portal and do not have one, please email office@wilkinsonrogers.com.

1. Personal Information

Your Name: _____ Your SIN: _____

Address: _____ Date of Birth: _____

Phone Numbers:

Mobile: _____ Home: _____

Work: _____ Ext. _____ Email: _____

Citizenship: Canadian Other: _____

Marital Status:

Single Married Common-law Separated Divorced Widowed

If marital status changed during the year, provide date of change:

Spouse's Name: _____ Spouse's SIN: _____

Spouse's Date of Birth: _____

Spouse's Phone Numbers:

Mobile: _____ Home: _____ Work: _____ Ext. _____

Spouse's Email Address: _____

2. Residence

Province/Territory of residence on December 31: _____

Did you move during the year? Yes No

Did you immigrate to Canada or emigrate from Canada during the year? Yes No

If yes, provide the date into Canada: _____ Or the departure date: _____

3. Foreign Reporting

Did you own or hold foreign property (including real estate) with a total cost between \$100,000 and \$250,000 CAD at any time during the year? Yes No

Did you own or hold foreign property (including real estate) with a total cost of more than \$250,000 CAD at any time during the year? Yes No

4. Dependents

Name	Relationship	Date of Birth	SIN	Physically or Mentally Infirm	Income	Child Care Expenses

If separated, are you claiming an eligible dependent? Yes No

5. General Income/Deductions

T-slips (T4, T4A, T4E, T5007) Yes No

Employment income or taxable benefits not shown on T4 slip: _____

If applicable, provide the amount paid for union and professional dues as well as the names of the organizations.

Do you have any income from the sharing economy such as Airbnb, VRBO, Uber, etc.? Yes No

List of childcare expenses, with receipts, for each child? Yes No

List of spousal support payments made or received? Yes No

List of deductible employment expenses? Yes No

Did you travel or relocate for work during the year? Yes No

Is a signed Form T2200 (required for employment expenses) attached? Yes No

RRSP contribution receipt? Yes No

First home savings account receipt? Yes No

6. Pension Income

T-slips (T4A, T4RIF, T4(OAS), etc.) Yes No

7. Investment Income/Deductions

T3 – Income from Trust allocations? Yes No

T5 – Investment income? Yes No

T4PS – Income from profit sharing plans? Yes No

T5013 – Partnership income? Yes No

T5008 – Income from securities transactions/ Realized gain/loss report? Yes No

Did you dispose of property or investments (including cryptocurrency) during the year (excluding residence designated as a principal residence) at any time in the year? Yes No

If yes, provide details (i.e., broker tax reporting package).

Interest paid to earn investment income? Yes No

If yes, enter amount: _____

Management fees paid? Yes No

If yes, provide statement.

Did you dispose of your principal residence during the year? Yes No

If yes, Proceeds: _____ Date acquired: _____

Did you dispose of any real property other than principal residence during the year? Yes No

If yes, provide the legal package and the following:

Proceeds: _____ Adjusted Cost Base: _____

8. Self-Employment/Business Income

Financial statement(s)/schedule of revenue and expenses attached? Yes No

If you used a vehicle for business, are the vehicle expenses and both total and business mileage attached? Yes No

If you used a portion of your home for business, are the homes expenses and both total and business square footage attached? Yes No

Is a list of all asset additions and disposals (including cars, equipment, etc.) attached? Yes No

9. Rental Income

Did you own rental property? Yes No

If yes, attach statement of rental income and answer the next question.

Did you also live in the rental property? Yes No

10. Other Credits

T2202A – Tuition amount paid for you? Yes No

TL11A – Foreign tuition paid for you? Yes No

T2202A – Tuition amount claimed on transfer from dependent (second page signed)? Yes No

Receipt or amount for your student loan interest? Yes No

Receipts/listing of all medical expenses paid in the year for you, your spouse, and dependents? Yes No

Receipts/listing of alterations to your home to enhance mobility/safety? Yes No

Receipts for seniors' home safety expenses? Yes No

- Receipts for charitable donations or donations made by way of gifting an item in kind? Yes No
- Receipts for political contributions? Yes No
- Receipts for digital news subscription? Yes No
- Was a first time homeowners savings account opened? Yes No
- List of eligible teaching supplies purchased (for teachers and early childhood educators only)? Yes No
- Public transit passes for travel for Ontario seniors (receipts/details)? Yes No
- Did you purchase your first home this year? Yes No
- Did you pay property taxes/rent in the year? Yes No
- If yes, provide the following:
- Amount paid: _____ Landlord/Municipality: _____