



Our Personal Tax Return Checklist is designed to help you make this process as easy and efficient as possible. It also assists us in ensuring that we have information that is as complete and accurate as possible to ensure your taxes are minimized and correctly reported. Please review the checklist and put together the relevant slips and information. You can attach the slips and send in a hardcopy or scan the information to your service contact here at Blue Ocean.

PERSONAL INFORMATION (If we prepared your _____ return, please complete ONLY if there is a change)

Name	SIN	Birth Date (yyyy/mm/dd)	Telephone	Email Address
Taxpayer _____	_____	_____	_____	_____
Spouse _____	_____	_____	_____	_____

Address _____

Marital Status Married Single Common-law Separated Divorced Widowed

If marital status changed during the year, provide date of change (yy/mm/dd) _____ Nature of change _____

Spouse's net income (If we are not preparing their return) _____ (Best estimate if not completely available)

RESIDENCE

Province or territory of residence on December 31 _____

Are you a U.S. Citizen or a Green Card holder? Yes No

Did you immigrate to Canada or emigrate from Canada during the past ten years? Yes No

If in the past year, provide date of entry into Canada (yy/mm/dd) _____ or date of departure (yy/mm/dd) _____

ELECTIONS CANADA

Are you a Canadian Citizen and Resident? Yes No

Do you wish to permit Elections Canada to utilize contact information to update the voter's list? Yes No

FOREIGN REPORTING

Do you own foreign assets outside your RRSP (other than personal use assets) with a cost greater than \$100,000? Yes No

Please provide details of ownership of foreign assets and transactions with foreign entities (PENALTIES APPLICABLE if not reported)

DEPENDANTS (unless unchanged, please provide)

Name	Birth Date (yyyy/mm/dd)	SIN	Relationship

Did you dispose of your principal residence during the year? Please provide details of and/or documents for purchase and sale Yes No

Do you provide in-home care for a parent or grandparent (including in-laws) 65 or older? Yes No

Do you support (in your residence) your parents, grandparents, brothers or sisters, aunts or uncles? Yes No

GENERAL INCOME/DEDUCTIONS

T4 SLIPS – Employment Income (including stock option benefits)? Yes No

T4A – Commission and self-employment (including directors' fees)? Yes No

T4E – Employment Insurance? Yes No



T5007 – Social Assistance or Workers’ Compensation? Yes No
 Income not included on T4 (directors fees, scholarships, bursaries, fellowships, tips, etc)? _____
 Professional or Union dues paid? _____
 Child care expenses? Please provide receipts for each child Yes No
 Support payments made or received? (spousal support and/or child support) Yes No
 Moving expenses? Please provide details with all receipts Yes No

INVESTMENT INCOME/DEDUCTIONS

T3 – Income from trust allocations? Yes No
 T5 – Investment Income (dividends, interest, including interest earned but not yet received, for example, Canada Savings Bonds)? Yes No
 T4PS – Income from profit sharing plans? Yes No
 T5013/T5013A – Partnership Income? Yes No
 T5008 – Income from Securities transactions? Yes No
 Other investment income, for example labour sponsored funds? Yes No
 Shares acquired and/or disposed of through exercise of stock options? Please provide details Yes No
 Did you dispose of property during the year (publicly traded shares, bonds, real estate, etc.)? Yes No
 If yes, please provide the following information as a separate document:

Description of property	Date Acquired	Date Disposed of	Sales Proceeds	Cost	Disposal expenses
Interest costs on funds borrowed to earn investment income	_____	Investment Management Fees	_____	Accounting/Legal Fees	_____

RRSP CONTRIBUTIONS AND OTHER CREDITS

Did you make any RRSP Contributions? Attach receipts (including those in the First 60 days of year _____) Yes No
 RRSP – Home Buyers’ Plan withdrawals and repayments; RRSP – Lifelong Learning Plan repayment? Please provide details Yes No
 Employment expenses (Form T2200 signed by employer), including tools? Yes No
 Tuition fees for yourself? (Form T2202A) Yes No
 Tuition fees for your dependant? (Form T2202A signed by student) Yes No
 Did you pay interest on student loans? Yes No
 Did you pay for any trade or professional examination or other professional dues? Yes No
 Did you complete a minimum of 200 hours of volunteer fire-fighting services in the year Yes No
 Medical expenses (including travel insurance, Gluten-free products, etc.)? Yes No
 Details of and Form T2201 (you or dependents for prolonged mental & physical impairment or life-sustaining therapy) (vision, memory, speech, Type 1 Diabetes, Kidney Disease, etc.)? Yes No
 Charitable donations? Yes No
 Political contributions? Yes No
 Are you eligible for the Home Buyer’s Amount? (You and your spouse have neither owned or lived in a home in the year of purchase or in the four preceding years) Yes No
 Did you incur any adoption related expenses? Yes No
 Eligible educator school tax credit? Claim up to \$1,000 for eligible teaching supplies Yes No