



**FRAN'S
TAX.ca**
CLIENT SLIP CHECKLIST

PERSONAL	SMALL BUSINESS
<p><u>Income Slips:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> All T4 slips <input type="checkbox"/> All other slips (T3, T5, T4E, T4A, T4AP, T4RSP, T4RIF) <input type="checkbox"/> Canada Pension Plan (T4ACPP) <input type="checkbox"/> Old Age Security (T4AOAS) <input type="checkbox"/> Other pensions and annuities <input type="checkbox"/> Social assistance <input type="checkbox"/> Child Support Information <input type="checkbox"/> Other income <input type="checkbox"/> W.S.I.B. Benefits <input type="checkbox"/> Disposal of property information <p>*e.g. mutual funds, shares, cottages, etc.</p> <p><u>Deductions/Credits:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> RRSP Contributions <input type="checkbox"/> Child Care <p>* If paid to individual, name, S.I.N., address.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Moving <input type="checkbox"/> Support paid child, spousal <p>* Date support payments started.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Employment Expenses & T2200 <input type="checkbox"/> Medical, Dental and Charitable receipts <p>*Prescription info. May be obtained through your pharmacy</p> <ul style="list-style-type: none"> <input type="checkbox"/> Tuition and Education <input type="checkbox"/> Interest and Safety Deposit Box expenses <p><u>Other Credits:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Rental and Property Tax Receipts <input type="checkbox"/> Installment and other payments <input type="checkbox"/> Child Tax Benefit <input type="checkbox"/> Goods & Services Tax Credit <input type="checkbox"/> Relief for Home Heating Credit <input type="checkbox"/> Lawyer's copy of property sale/purchase <p><u>Other Information:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Direct Deposit Information <p>*branch, institute and account #'s on the bottom of your check</p> <ul style="list-style-type: none"> <input type="checkbox"/> Address changes (residential & mailing applies) <input type="checkbox"/> Electronic Filing Options <input type="checkbox"/> Other info. That may be applicable to your return. 	<ul style="list-style-type: none"> <input type="checkbox"/> Sales, Commissions, Subcontract income <p><u>Expenses:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Advertising <input type="checkbox"/> Meals & Entertainment <input type="checkbox"/> Bad debts <input type="checkbox"/> Insurance, W.S.I.B. <input type="checkbox"/> Interest <input type="checkbox"/> Bus. Tax, fees, licenses, dues, memberships, & subscri <input type="checkbox"/> Office expenses <input type="checkbox"/> Supplies <input type="checkbox"/> Legal, accounting, and other professional fees <input type="checkbox"/> Management and administration fees <input type="checkbox"/> Rent <input type="checkbox"/> Maintenance and repairs <input type="checkbox"/> Salaries, wages, and benefits <input type="checkbox"/> Property taxes <input type="checkbox"/> Travel Log <p>*e.g. Km(s) driven to and from, accommodations, & meals</p> <p><u>New Clients:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Prior Year -Income Tax Return <p>* carry forward credits, fees paid, ect...</p> <ul style="list-style-type: none"> <input type="checkbox"/> Birth Certificates (all dependants) <input type="checkbox"/> S.I.N. numbers <input type="checkbox"/> Separation Agreements, Divorce Agreements <input type="checkbox"/> Custody Information <input type="checkbox"/> Support Payment Agreement <input type="checkbox"/> Canadian Resident? Yes or No <input type="checkbox"/> Elections Canada? Yes or No