

Dynbamicnumbers Professional Corporation
 Chartered professional accountants
 PO Box: 81702 The Concourse,
 North York, ON. M2R 3X1
 Tel: 416 910 8656
www.Dynamicnumbers.ca



Checklist for preparation of Personal Tax

Part 1 THIS PART IS FOR NEW CLIENTS ONLY: If you have sent your previous T1s or we've done your prior year taxes DO NOT complete this part:

	Description	Reference
1	Name	
2	Address:	
3	Telephone	
4	Email	
5	Date of Birth	
6	SIN	
7	Marital Status	
8	Spouse/ Common law Name	
9	Spouse/ Common law SIN	
10	Spouse/ Common law Date of Birth	
11	Date of change in Marital status if any	

Part 2: Please see if any of the followings are applicable to you or your family:

Documents needed for preparation:

12	Charitable Donations	
13	Dental or Medical expenses (Eyeglass, health insurance, travel insurance.....)	
14	Tuition fee receipt T2202A	
15	Interest paid on student loan	
16	Caregiver amount (Name, SIN, and net income of dependent)	
17	Claimed form Disability amount	
18	Capital losses or Non-capital losses from previous years	
19	Investment consulting fee, Safety box charges, accounting fees	
20	Moving expenses when you get closer to workplace or secondary school 40KM	
21	Care expenses Attendant (SIN + amount)	
22	Childcare expenses (Daycare or person's Address, Name, SIN)	
23	Union dues or/and professional dues	

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24	RRSP contribution (receipt from financial institution)	
25	T5007 slip for stoical assistance benefits	
26	Self-employed or commission income and expenses	
27	Scholar ships, Bursaries, research grants or director’s fees.	
28	Withdraw funds form RRSP T4RSP slip	
29	Rental properties; gross rental income and related expenses including (Property tax, R &M, Mortgage interest, Insurance, utilities, ads, management fees, Attach the property tax receipts and mortgage statements,	
30	Investments slips, T5013, T5003	
31	Interest or dividend income, T5, T3/or T600 slips.	
32	Employment insurance benefits, T4E slip.	
33	List of dependents, (children, parents other dependents): birthday, SIN, net income and so on.	
34	T4A(OAS) Old age security, T4A(P) Pension plan, T4A,	
35	Employment T4s and commission income T4A.	
36	List of foreign properties outside Canada of more than \$100, 000 worth	
37	List of companies outside of Canada	
38	Income form US (employment or self-employed slips)	
39		
40		

Please attach the applicable documents to this form and email it to Info@Dynamicnumbers.ca