

PERSONAL TAX INFORMATION CHECKLIST

PLEASE COMPLETE THE FORM AS APPLICABLE

Section A

IDENTIFICATION

PLEASE CIRCLE Mr. Mrs. Ms. Miss or _____

NAME LAST FIRST INITIAL SOCIAL INSURANCE NUMBER

DATE OF BIRTH (YYYY-MM-DD)

PLEASE CIRCLE Mr. Mrs. Ms. Miss or _____

SPOUSE LAST FIRST INITIAL SOCIAL INSURANCE NUMBER

DATE OF BIRTH (YYYY-MM-DD)

ADDRESS

NUMBER AND STREET APT or UNIT CITY PROV POSTAL CODE

TELEPHONE RESIDENCE BUSINESS E-mail address

MARITAL STATUS

- () SINGLE () WIDOWED () SEPARATED
() MARRIED () DIVORCED () COMMON LAW

If marital status changed during 2007. Please provide change and date _____

DEPENDENTS

Table with columns: NAME, DATE OF BIRTH (YYYY-MM-DD), Son/Daugh-Parent, INCOME - IF ANY, SIN NUMBER

Section B

PLEASE ANSWER THE FOLLOWING QUESTIONS

- 1. Do you agree to Canada Revenue Agency providing, your name, address and date of birth to Elections Canada?
2. Did you own any Foreign Property such as stocks, bonds or rental property at any time in 2007 with a total cost of more than \$100,000.00 Canadian?
3. Electronic Filing. Do you wish to E-File your return?
4. Have you provided a copy of your 2006 Income Tax Notice of Assessment?
5. If you are not already receiving your refund by direct deposit, do you wish to have direct deposit of your refund?
6. Do you have self employment income?
7. Do you have rental income and expenses?
8. Are you able to claim employment expenses?

PLEASE SEE INCOME AND DEDUCTION CHECKLIST ON THE REVERSE AND SUPPLEMENTARY WORK SHEET.

INCOME AND DEDUCTION CHECKLIST

INCOME

Please check where applicable and provide an information slip or supporting documentation

- () Employment Income - T4 Slip
- () Other Employment Income. If not a T4 - please provide details
- () Pension Income - Old Age, CPP, Reg Pensions incl., US Social security & Foreign Pensions T4A/T4A(OAS)/T4A(P)
- () RRSP, RRIF & Annuities - T4RSP/T4RRIF
- () Elected Split-pension amount (please contact our office for details)
- () Employment Insurance Benefits - T4E
- () Alimony and Separation Allowances **received**
Pre May 1997 Agreement Post May 1997 Agreement
Spousal Support \$ Child Support \$
Received from: _____ Social Insurance Number _____
- () **Rental Income and Expenses - Please provide details on the Work Sheet**
- () Investment Income - Dividends from Canadian and Foreign Corporations - T5's etc.
- () Interest Income (GIC, Bonds & Mortgages) - T5
- () Estate & Trust Income including from Trust Units and REITS - T3
- () Other Investment Income not listed such as flow through shares
- () Capital Gain or Loss Transactions - Please provide Trading slips and Brokers statements as well as the cost of the sold securities.
Include any Mutual Fund sales **outside** your RRSP/RRIF accounts.
- () **Self-Employment Income - Please provide a detailed listing of Income and Expenses**
- () Workers Safety Insurance Board and Social Assistance payments - T5007
- () Universal Child Care Benefit - RC62
- () Other Income not listed - Please provide details

DEDUCTIONS AND CREDITS

Please check where applicable and provide an information slip, receipt or other supporting documentation.

- () Adoption expenses (Please call our office for details)
- () Alimony and Child support payments. Please check
Pre May 1997 Agreement Post May 1997 Agreement
Spousal Support \$ Child Support \$
Paid to: _____ Social Insurance Number _____
- () Annual Union and Professional Dues Receipts
- () Caregiver Credit information - Please provide name, birth date & net income of your qualified dependent
- () Carrying Charges - Investment loan interest expense, Safe deposit box and accounting fees
- () Charitable Contributions and Federal and Provincial Political donations receipts
- () Child Care & Child Fitness Receipts
- () Disability Claim - T2201 required for first time claimants
- () Limited Partnerships & other Tax Shelter receipts.
- () Medical Receipts
- () Moving expenses (Please provide new and old work locations, addresses and total KMS travelled)
- () Public Transit Weekly & Monthly Pass Receipts
- () Rent or Property Taxes paid.
- () Pension Split election amount (Please contact our office for details)
- () RRSP - Home Buyers Plan receipts and documentation.
- () RRSP Contribution Receipts
- () Stock option information and contributions.
- () **Travel, Employment or Commission Expenses - Form T2200 required.**
Please provide details on the Work Sheet
- () Tuition Fees, education and textbooks as shown on the T2202, which is a required form
- () Other items. Please detail on separate sheet.

If you have any questions please contact our office at 905-686-2407 or email thomaschase@on.aibn.com

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SUPPLEMENTARY WORKSHEET

Please complete as applicable to your type of income and/or expense

INCOME

Rental Income \$ _____
Self employed income _____

EXPENSES

Advertising \$ _____
Bad Debts _____
Business tax, fees and dues _____
Delivery and freight _____
Insurance _____
Interest and bank charges _____
Maintenance and Repairs _____
Meals _____
Office expenses _____
Supplies _____
Legal and Accounting _____
Property Taxes _____
Rent _____
Salaries, wages and benefits _____
Subcontract _____
Travel other than automobile _____
Telephone _____
Utilities _____
Private health services plan premiums _____
Other _____
(Please provide details) _____
Capital additions (Type) _____

VEHICLE EXPENSES

Business use of vehicle Total Kms for year Business Kms

Gasoline \$ _____
Repairs & Maintenance _____
License _____
Interest _____
Insurance _____
Lease costs _____
Purchase/lease of new vehicle (please provide purchase or lease agreement)

WORK SPACE IN HOME

Sq feet Business use Total

Electricity and Water \$ _____
Heat _____
Maintenance _____
Insurance _____
Property Taxes _____
Mortgage interest _____
Other (Provide details) _____

YOU MAY FIND IT MORE CONVENIENT TO PROVIDE A SPREAD SHEET USING A SIMILAR FORMAT