



Simpson & Associates
207-2289 Fairview Street
Burlington, ON
L7R 2E3
905-464-0029

Name: _____ DOB: _____
Address: _____
Phone Number: _____ E-mail: _____
Marital Status: _____ Spouse if applicable: _____
Children: _____

Checklist for Completion of Tax Return

1. Were any adjustments made to your prior year tax return? If yes, please provide a copy of your notice of assessment and any adjustment notices from CRA.
2. Total property taxes paid in 2016:
3. Income Slips, including:
 - T4 for employment income
 - T5 for interest income
 - T3 for trust or pension income
 - RRSP income
 - CPP/OAS income
 - Employment Insurance Income
4. Rental or Self-employed business income. This can be discussed when you have all the information together. Please ensure that you keep all receipts for any income expenses you are claiming.
5. If you sold anything that will cause a capital gain or loss, please provide the purchase price, number of shares, and year they were acquired.
6. RRSP receipts for any contributions
7. Other deductions:
 - Child care – please provide amounts and name of person or organization
 - Professional or union dues
 - Carrying charges and interest expense
 - Charitable donation receipts
 - Education receipts
 - Fitness tax credit receipts
 - Public transit tax credit receipts
8. Did you make any instalment payments? If yes, how much: