

Self Employment Tax Checklist

Full Name _____

Address _____

Telephone # _____

Date of Birth _____

SIN _____

Canadian Citizen _____

Marital Status

<input type="checkbox"/>	Married	<input type="checkbox"/>	Single	<input type="checkbox"/>	Common Law	<input type="checkbox"/>	Separated	<input type="checkbox"/>	Divorced	<input type="checkbox"/>	Widowed
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Business

Professional

Commission

Fiscal Period

_____ to _____
YYMMDD YYMMDD

Dependants

Name	Birthdate

Information Slips

<input type="checkbox"/>	T3	<input type="checkbox"/>	T4A[P]	<input type="checkbox"/>	T4RSP	<input type="checkbox"/>	T5007
<input type="checkbox"/>	T4	<input type="checkbox"/>	T4[OAS]	<input type="checkbox"/>	T4RIFT4U	<input type="checkbox"/>	RC62
<input type="checkbox"/>	T4A	<input type="checkbox"/>	T4E	<input type="checkbox"/>	T5	<input type="checkbox"/>	

Receipts

- T2201 – Disability Tax Credit Certificate
- T2202 – Tuition/Education amounts for qualifying students
- Attendant Care expenses for a disabled person
- Charitable or political donations
- Child care expenses
- Children’s fitness programs/activities
- Interest paid on student loans
- Medical/dental expenses not covered by a health plan
- Property taxes
- Rent and landlord’s name[s] addresses of residence[s]
- RRSP contributions
- Transit passes [for monthly or weekly passes]
- Healthy Homes – renovation tax credit eligible expenses
- Moving Expenses – [if you moved over 40km to a new work location or for a new job]
- Last year’s Income Tax Return [if you are a new client]
- Last year’s Notice of Assessment [if you are a new client]