

**MANTELL DICKSON BLADES DUSANJ**  
**Personal Income Tax Information Sheet**

Please review this checklist and complete all relevant sections. Please ensure that you have received all income slips, receipts and other information prior to submitting your tax information to us to ensure your return is processed on a timely basis.

Our *Personal Income Tax Information Sheet* and other forms to assist you in assembling your tax information are available on our website at [www.mdbd.ca](http://www.mdbd.ca).

To ensure our records stay up to date, we ask that you please inform us of any changes to your contact information when they occur.

**CONTACT INFORMATION**

	<b>Taxpayer</b>	<b>Spouse/Common-law Partner</b>
<b>Name:</b> <i>(First, Initial, Last)</i>	_____	_____
<b>Address:</b>	_____	_____
	_____	_____
<b>Date of Birth:</b>	_____	_____
<b>SIN:</b>	_____	_____
<b>Phone Number:</b>	_____	_____
<b>Fax Number:</b>	_____	_____
<b>Email Address:</b>	_____	_____
<b>Preferred Method of Communication?</b>	<input type="checkbox"/> Phone	<input type="checkbox"/> Fax <input type="checkbox"/> Email
<b>Marital Status:</b> Single      Married      Separated		<b>We prepare their return?</b> Y      N
<i>(circle one)</i> Divorced      Widowed      Common-law		If yes, please provide the appropriate tax information.
If marital status changed during year, give month/day of change: _____		If no, what was their net income for the year? <i>(Line 236 on their tax return)</i>
		\$ _____

**GENERAL INFORMATION**

	<b>Taxpayer</b>	<b>Spouse/Partner</b>	<b>Dependants</b>
<b>Are you a Canadian Citizen?</b>	Y    N	Y    N	Y    N
<b>Are you also a citizen of another country?</b>	Y    N	Y    N	Y    N
If yes, what country? _____	_____	_____	_____
<b>Did you own foreign property with a cost of over \$100,000 CDN at any time during the year?</b>	Y    N	Y    N	Y    N
<b>Would you like to give your name and address to Elections Canada for the voters list?</b>	Y    N	Y    N	Y    N

**DEPENDANT INFORMATION**

Please provide the following information for each dependant you financially supported during the year:

#	Dependant Name <i>(First and Last)</i>	SIN	Gender <i>(M/F)</i>	Date of Birth <i>(MM/DD/YYYY)</i>	Relationship to You	Live with You?	We prepare return? <i>(Note 1)</i>	Net Income (\$)
1								
2								
3								
4								
5								

**NOTE 1:**

If yes, please provide the appropriate tax information.

If we are not preparing your dependant(s) return and you wish to claim any unused tuition credits of your dependant(s), please provide a copy of the T2202A (tuition slip) from the recognized educational institution and ensure you provide us with their net income for the year in the space provided above. You can find this amount on Line 236 of their tax return.

**MANTELL DICKSON BLADES DUSANJ**  
**Personal Income Tax Checklist**

**TAX INFORMATION**

Please provide copies of the following slips and/or information as they apply for each individual we are preparing returns for: *(check all that apply)*

**INCOME**

**PROVIDE**

<input type="checkbox"/>	Employment and commission income		T4
<input type="checkbox"/>	Profit sharing		T4PS
<input type="checkbox"/>	Pension, employment benefits and other income		T4A
<input type="checkbox"/>	Old Age Security		T4A(OAS)
<input type="checkbox"/>	CPP Benefits		T4A(P)
<input type="checkbox"/>	Employment insurance benefits		T4E
<input type="checkbox"/>	Social Assistance/WCB		T5007
<input type="checkbox"/>	Contract payments		T5018
<input type="checkbox"/>	RRSP Income/Withdrawals		T4 RSP
<input type="checkbox"/>	RRIF Income		T4 RIF
<input type="checkbox"/>	Universal Child Care Benefit <i>(\$1,200 per child &lt; 6 years old)</i>		RC 62
<input type="checkbox"/>	Trust unit/mutual fund income		T3
<input type="checkbox"/>	Interest and dividend income		T5
<input type="checkbox"/>	Statement of Security Transactions		T5008
<input type="checkbox"/>	Limited Partnership Income		T5013
<input type="checkbox"/>	Self-employment income <i>Worksheets available at www.mdbd.ca</i>		Summary and/or Receipts
<input type="checkbox"/>	Rental income <i>Worksheets available at www.mdbd.ca</i>		Summary and/or Receipts
<input type="checkbox"/>	Capital gains/losses <i>Worksheets available at www.mdbd.ca</i>		Summary and/or sale documentation
<input type="checkbox"/>	Foreign income		Summary and/or other tax receipts
<input type="checkbox"/>	Other- please specify: _____		

Please note, you may not receive T3 or T5013 slips until mid-April as investment companies have until March 31 to issue these slips. If you are not sure if you will be receiving these slips, contact your investment advisor.

Examples of other income include support payments, income for which T4 slips were not issued (tips and/or odd jobs), stock options exercised and/or sold, or any other income received that is taxable.

**DEDUCTIONS**

**PROVIDE**

<input type="checkbox"/>	RRSP contributions <i>(March 2, 2010 to March 1, 2011)</i>		Tax Receipts
<input type="checkbox"/>	Union, professional dues <i>(only if paid personally)</i>		Tax Receipts
<input type="checkbox"/>	Safety deposit box charges		Record of amounts paid
<input type="checkbox"/>	Interest and carrying charges on funds borrowed for investing purposes		Record of amounts paid
<input type="checkbox"/>	Investment counsel and accounting fees		Record of amounts paid
<input type="checkbox"/>	Employment/commission expenses <i>Worksheets available at www.mdbd.ca</i>		T2200 & Summary and/or Receipts
<input type="checkbox"/>	Child care expenses		Summary and/or Receipts
<input type="checkbox"/>	Moving expenses <i>(moving &gt; 40km closer to work/school location)</i>		Summary and/or Receipts
<input type="checkbox"/>	Other- please specify: _____		

Examples of other expenses include support payments, legal expenses incurred to collect income, repayments of income from prior years, or any other expenses incurred that are deductible for tax purposes.

**TAX CREDITS**

**PROVIDE**

<input type="checkbox"/>	Disability amount		T2201
<input type="checkbox"/>	Tuition fees/education credit <i>(must be &gt; \$100 to recognized institution)</i>		T2202 or other tax receipts
<input type="checkbox"/>	Interest paid on student loans		Record of amounts paid
<input type="checkbox"/>	Medical expenses <i>(must be &gt; 3% of net income)</i>		Summary and/or Receipts
<input type="checkbox"/>	Attendant care expenses <i>(must have signed T2201)</i>		Record of amounts paid
<input type="checkbox"/>	Charitable donation receipts		Tax Receipts
<input type="checkbox"/>	Political contribution receipts		Tax Receipts
<input type="checkbox"/>	First Time Home Buyer credit		Summary and/or Receipts
<input type="checkbox"/>	Public transit passes		Summary and/or Receipts
<input type="checkbox"/>	Children fitness credit <i>(max. \$500 per child)</i>		Summary and/or Receipts
<input type="checkbox"/>	Other- please specify: _____		

Examples of other credits include adoption expenses, taxes paid to other countries, or any other expenses for which a tax credit is available.

**OTHER INFORMATION**

<input type="checkbox"/>	Income tax instalments paid during year
<input type="checkbox"/>	Prior year notice of assessment and reassessments
<input type="checkbox"/>	Prior year tax return (if you are a new client)
<input type="checkbox"/>	Details of Home Buyer Plan or Lifelong Learning Plan withdrawals or repayments during year
<input type="checkbox"/>	Any other information that you feel will assist our office in preparing your return

**DISCLAIMER**

This personal income tax information sheet does not include all possible income and expense items that may be applicable to your particular tax situation. It is meant to be a guide to assist you in assembling your package. If you have other information that is not included on this sheet and you are not sure if there are tax implications, please feel free to contact our office at any time and one of our staff members would be happy to assist you and answer your questions.

Please note that Canada Revenue Agency performs regular reviews of income, expenses and credits claimed on tax returns. If your return is selected for review, you will be required to provide documentation to support amounts claimed. As a result, we want to reinforce the importance of providing our office with complete and accurate information and to remind you to keep all your tax receipts and records for a period of 6 years.

Thank you.