



## MTS TAX

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### Income Tax Preparation Checklist

#### --- Personal Information ---

- |  |  |
|--|--|
| <input type="checkbox"/> Name _____                    | <input type="checkbox"/> Citizenship _____   |
| <input type="checkbox"/> Social Insurance Number _____ | <input type="checkbox"/> Bank account if you want to set up or<br>update your direct deposit with the CRA<br>_____ |
| <input type="checkbox"/> Mailing address _____         | <input type="checkbox"/> Dependents- Name, DOB, Custody?<br>_____<br>_____   |
| <input type="checkbox"/> Date of birth _____           |  |
| <input type="checkbox"/> Marriage status _____         |  |
| <input type="checkbox"/> Email _____                   |  |
| <input type="checkbox"/> Phone # _____                 |  |

*Notes: For all existing clients, we have your information on file. Just let us know of anything you want to update. For new clients, please complete one form per person.*

#### --- Tax Slips --- (available on the CRA My Account)

- |                                |                               |                                   |                                |   |
|--------------------------------|-------------------------------|-----------------------------------|--------------------------------|---|
| <input type="checkbox"/> T4    | <input type="checkbox"/> T4E  | <input type="checkbox"/> T4A      | <input type="checkbox"/> T4RIF | <input type="checkbox"/> RRSP Contribution      |
| <input type="checkbox"/> T5    | <input type="checkbox"/> T3   | <input type="checkbox"/> T4A(P)   | <input type="checkbox"/> T5007 | <input type="checkbox"/> Home Buyers Plan       |
| <input type="checkbox"/> T4RSP | <input type="checkbox"/> RC62 | <input type="checkbox"/> T4A(OAS) | <input type="checkbox"/> T5008 | <input type="checkbox"/> Lifelong Learning Plan |

*Notes: You can authorize us to get above slips from the CRA online service My Account. However, it is possible there are missing or incorrect slips. Therefore, we are still encouraging you bring all your tax slips while preparing your tax return.*

#### --- Tax Slips and Information --- (NOT available on the CRA My Account)

- |  |  |
|--|--|
| <input type="checkbox"/> T2202A  | <input type="checkbox"/> Medical expenses _____                    |
| <input type="checkbox"/> Spousal support payments _____  | <input type="checkbox"/> Childcare expenses _____                  |
| <input type="checkbox"/> Interest expenses or management fees to<br>earn income from investments _____ | <input type="checkbox"/> Donations _____                           |
| <input type="checkbox"/> Rent or property tax if your family income is<br>lower than \$70,000 _____    | <input type="checkbox"/> Monthly bus passes up to June 2017 _____  |
|  | <input type="checkbox"/> Interest paid on your student loans _____ |
|  | <input type="checkbox"/> Others _____                              |

#### --- Other Information ---

- |   |   |
|---|---|
| <input type="checkbox"/> Did you sell or purchase a home last year? | <input type="checkbox"/> Is this your first time filing a tax return? |
| <input type="checkbox"/> Foreign Property over \$100,000?           |   |

#### --- Other Checklists you may need ---

- |  |   |
|--|---|
| <input type="checkbox"/> Employment Expenses Tax Checklist       | <input type="checkbox"/> Moving Expense Tax Preparation Checklist |
| <input type="checkbox"/> Self-employed Tax Preparation Checklist | <input type="checkbox"/> Rental Income Tax Preparation Checklist  |

*Note: All checklists can be downloaded from our website [mtstax.ca](http://mtstax.ca)*

**We Do Taxes Right!**