



PERSONAL TAX INFORMATION CHECKLIST

PERSONAL INFORMATION

Full Name: _____ SIN: _____

Date of Birth: _____ Email: _____

Address: _____

Phone: _____

Marital Status: Single Married Common-law Divorced Widowed

Spouse's Name: _____ Dependents: _____

Moved during the year? Yes No New client? Yes No

INCOME INFORMATION

T4 – Employee	T5007 – Statement of Benefits
T4A – Contractor / Self-employment / Pension	Business Income (T2125)
T4A (OAS) – Old Age Security	Rental Income (T776) — How many?
T4E – Employment Insurance	Investment Income (T5008/T3/T5)
T4PS – RRSP Withdrawal	RRSP Contributions
T2200 – Employment Expenses	

EXPENSES & DEDUCTIONS

Rent Expense	Charitable Donations
Tuition Expense (T2202A)	Child Care Expenses
Medical Expenses	Professional Dues
Property Sale (Principal Residence?)	Yes No
Foreign Property > \$100,000 (T1135)	Yes No

Other Deductions: _____

DECLARATION

I confirm that the above information is accurate and complete to the best of my knowledge.

Signature: _____

Date: _____

Building Legacies, Beyond Numbers.

Please email the completed form and supporting documents to info@aegisfg.ca