SIEVERT & SAWRANTSCHUK LLP
CHARTERED ACCOUNTANTS

43 Colborne Street, PH
Toronto, Ontario M5E 1E3
Tel: (416) 979-7444 Fax: (416) 979-8432
e-mail: sievertca@baxter.net
www.sievert.on.ca

2010 PERSONAL TAX CHECKLIST

ATTACHED IS A SIMPLE CHECKLIST THAT WILL GUIDE YOU THROUGH THE VARIOUS FORMS AND INFORMATION THAT WE WILL NEED TO PREPARE YOUR 2010 INCOME TAX RETURN.

PLEASE TAKE A MOMENT TO REVIEW THE CHECKLIST, GATHER THE REQUIRED INFORMATION THAT RELATES TO YOUR PERSONAL SITUATION AND PROVIDE US WITH THE RELEVANT DATA.

WE LOOK FORWARD TO ASSISTING YOU IN YOUR 2010 PERSONAL INCOME TAX RETURNS.

FROM YOUR DEDICATED TEAM AT

SIEVERT & SAWRANTSCHUK LLP

2010 PERSONAL TAX CHECKLIST

Name: ____

This checklist should be completed and returned together with the financial information assembled.

[x]	**IF APPLICABLE TO YOU**	**PLEASE PROVIDE**
GENERAL INFORMATION		
Any changes to:		
[ ]	Name	Provide details
[ ]	Address	Provide details
[ ]	Email address	Provide new one
[ ]	Marital(status (considered married if living common law)	Provide details
[ ]	New dependants	Provide names, date of birth, SIN, income if applicable
[ ]	Credits to be transferred to you (tuition, public transit, aqe, disability)	Provide details
[ ]	2009's Assessment Notice from CRA	Copy of all pages
[ ]	Any reassessment notices received	Copy of all pages
[ ]	Any installments paid	Copy of statement - T2DR
EMPLOYMENT INCOME		
[ ]	Regular earnings	All T4's or pay slips
[ ]	Odd jobs, tips	Pay slips, details
[ ]	Director's fees	T4's or details
[ ]	Profit sharing income	T4PS slip
[ ]	loans from employer	Full details
[ ]	Any other employment benefits	Full details

2010 PERSONAL TAX CHECKLIST

[x] IF APPLICABLE TO YOU	PLEASE PROVIDE
PENSION, RETIREMENT, ANNUITY INCOME	
[ ] Old Age Security	T4A(OAS) slip
[ ] Canada Pension	T4A(P)
[ ] Foreign (eq. U.S. Social Security)	Details, foreign slips
[ ] Employment (including retiring allowance)	T4A
[ ] Registered Retirement Income Fund	T4RIF
[ ] Withdrawal from a R.R.S.P.	T4RSP slips, details
[ ] Annuity Payments	Full details, information slips
[ ] Other	Details
INVESTMENT INCOME	
[ ] Interest	T5 slips or pass books
[ ] Term deposits or G.I.C.'s	T5 slips or details
[ ] Mutual fund investment income	T3 slips or statements
[ ] Dividends - Canadian corporation	T5 slips
[ ] Interest - Canada Savings Bonds	T5, T600 or T600C slips (Details if no slips - for accrual)
[ ] Interest - joint account with spouse	Details of split
[ ] Interest - mortgage or other loans	Details, amortization schedule
[ ] Foreign interest or dividends	Foreign slips or details
[ ] Interest - Treasury bills	Full details of transactions
[ ] Royalty or other investment income	Details
[ ] Partnership income	T5013
[ ] Other	T5008 or other information
INCOME FROM SELF EMPLOYMENT	
[ ] General	Record of all revenues & expenses
[ ] Assets purchased, sold during year	Dates, descriptions, details
[ ] Any partners	Name(s) and share(s)
[ ] Salary paid spouse	Details of work done
[ ] Inventory	Value of closing inventory
[ ] Accounts receivable, payables	List of each
[ ] Any special elections in prior years	Details

2010 PERSONAL TAX CHECKLIST

[x]	IF APPLICABLE TO YOU	PLEASE PROVIDE
SALE/EXCHANGE OF INVESTMENTS		
[ ]	Stocks, bonds, trust units	Transaction slips/details, broker statements (for any month with a transaction, plus for month of December), information circular (for takeovers, share exchanges, reorganizations, etc.)
[ ]	Real estate and other properties	Sale documents, details of purchase
[ ]	Any properties gifted to others	Full details
[ ]	Elections in Prior Years(s)	Full details
[ ]	Prior year Reserves	Full details
RENTAL INCOME		a
[ ]	General	Details of all revenue & expenses
[ ]	New properties	Purchase agreement & details
[ ]	Rental of part of residence	Details of split
[ ]	Change of use of rental property	Date and details
[ ]	Sale of rental property	Sale documents and details of purchase
OTHER INCOME		
[ ]	Employment Insurance Benefits	T4E Slip
[ ]	WCB benefits	T4, T5007, details
[ ]	Social assistance payments	Full details, slips
[ ]	Alimony or child support received	Full details
[ ]	Scholarships, bursaries	Details, T4A slip(s)
[ ]	Universal Child Care Benefit	RC62 slip
[ ]	Other	Full details
EMPLOYMENT RELATED EXPENSES		
[ ]	General - required by employer to pay Certain expenses	Form T2200
[ ]	Travel Auto	Records of expenses and calculation of business mileage
[ ]	Moving expenses	Details of charges
[ ]	Other expenses	Details of charges
[ ]	Transport employees	Form TL2
[ ]	Union or Association Dues	Official tax receipts

2010 PERSONAL TAX CHECKLIST

[x] IF APPLICABLE TO YOU	PROVIDE
INVESTMENT EXPENSES	
[ ] Borrow money to earn investment income	Record of interest paid
[ ] Borrowed on margin account (stocks)	Records from broker
[ ] Safety deposit box use	Record of charges
[ ] Accounting fees to record income	Details of charges
[ ] Investment counsel and investment management fees	Details of charges
[ ] Tax shelters	Purchase documents
LIFETIME CAPITAL GAINS DEDUCTION	
[ ] Assets that would still qualify to claim the enhanced $750,000 capital gains deduction (for example, farm property, small business corp. shares sold)	Complete details, as follows - date acquired, cost and value Dec 31/71 (if owned before that date)
HOME RENOVATION TAX CREDIT	
[ ] Qualifying renovation expenditures [Jan. 28, 09 to Jan 31, 10]	Copies of receipts for qualified expenditures. Please see our website www.sievert.on.ca or the CRA's website www.cra.gc.ca
ALL OTHER DEDUCTIONS AND CREDITS	
[ ] Alimony or separation allowance paid	Record of payment & details
[ ] Tuition fees over $100 paid (post-secondary)	Official tax receipt(s)
[ ] Registered Retirement Savings Plan	Official tax receipt
[ ] Stocks/bonds rolled over into RRSP	Official tax receipt, details
[ ] Donations to registered charities	Official tax receipts
[ ] Unused prior year donations	Full details
[ ] Amounts paid for child care	Details of payments
[ ] Medical Expenses for any 12 month period ended in tax year, including private insurance (i.e. Blue Cross, travel health ins.) premiums and amounts deducted from your pay cheque for same	Receipts, details
[ ] Political Contributions paid	Official tax receipts
[ ] Loss on shares of or loss on loans to a private company	Full details
[ ] Self or dependant attend University	Form T2202 of T2202A
[ ] Disability Credit	Form T2201 (first year)
[ ] Incurred disability support costs	Full details, Form T929
[ ] Contribute to support of relative	Full details
[ ] Parent or parents (over 65) live with you	Full details
[ ] Non resident dependants supported	Full details
[ ] Oil & Gas, Mining investments	Full details
[ ] Canadian Feature Films, Videos	Full details
[ ] Public transit passes	Receipts
[ ] Children's fitness credits / non-fitness activities such as chess, music	Receipts
[ ] Adoption expenses	Full details
[ ] Other, if not mentioned	Full details

[x] IF APPLICABLE TO YOU	PLEASE PROVIDE DETAILS
FOREIGN REPORTING REQUIREMENTS & MISCELLANEOUS	
[ ] Received any funds from a foreign trust after 1995, have ever transferred or loaned property to a foreign trust.	Full details - discuss situation
[ ] Own over 1 % of a foreign corporation or trust, and together with related parties own over 10%	Full details - discuss situation
[ ] Owned assets outside Canada with a cost in excess of $100,000 (Canadian funds) during the year	Full details - discuss situation
[ ] Became or ceased to be a resident of Canada during the year	Date of status change
FIRST TIME HOME BUYER "HBTC"	
[ ] Purchased first home during the year	Details of purchase
TAX FREE SAVINGS ACCOUNT	
[ ] Made a contribution to a TFSA	Copy of contribution slips (if your bank sent to you.) Otherwise, state the 2010 contribution amount so we may verify with your Notice of Assessment.