

# Personal Tax Checklist

ASHERN • BIRTLE • NOTRE-DAME-DE-LOURDES • STEINBACH • STONEWALL • WINNIPEG (ST. BONIFACE & ST. NORBERT)

## Please notify us of any changes:

Address  
Marital status  
New dependents

### Income Items:

Previous year's Notice of Assessment  
All information slips  
*(i.e. T3, T4, T4A (OAS), T4A (P), T4PS, T4E, T4RSP, T4RIF, T5, T5008, UCCB)*  
Investment income not reported on slips  
*(interest, dividends, capital gains)*  
Investments summary and number of Financial Advisor  
Partnership statements  
Business, professional, agricultural or rental property income and expenses  
Sale of property including stocks, bonds, and real estate  
*(please provide details)*  
Did you receive any gratuities or tips?  
Foreign income/investments  
Additional information:

## Tax Credits:

Medical expenses *(sort and add own medical receipts to reduce fees)*  
Disability tax credit – form T2201  
Tuition fees - form T2202A *(signed by student)*  
Charitable donations  
Tax instalments *(slips or details)*  
Property taxes or rent paid  
Children's arts/fitness amount  
Public transit amount  
Adoption expenses

## Deductions:

RRSP contributions  
Union and/or professional dues  
Child care expenses  
Interest expense related to business or investments  
Safety deposit box *(applicable for 2012 and earlier years)*  
Alimony or child support  
Moving expenses  
Employment expenses *(automobile and home office)* -  
Please provide a signed T2200 form from your employer  
Prior year losses

*\*Starting in 2012 and subsequent years, mandatory e-filing is required for all tax returns. If you would like for us to paper-file your return, a surcharge of \$40 will apply. (Non-compliance will result in CRA assessing a penalty to our firm.)*

## FEES (\$)

Basic Charge	98.95	RRSPs <i>(per slip)</i>	6.50
T3 <i>(per slip)</i>	8.95	Tuition Fee Schedule	8.95
T4 <i>(per slip)</i>	8.95	Transfer of Tuition Fee from a Student	<i>starting at 10.50</i>
T5 <i>(per slip)</i>	8.95	Paper File Return (*)	40.00
T4A (P) / T4A (OAS) & most other T-slips <i>(per slip)</i>	8.95	Fitness Tax Credit	10.50
Capital Stock Transaction <i>(per transaction)</i>	5.50	Children's Arts Amount	10.50
Child Care Expense Schedule	15.00	T1 Adjustments	<i>starting at 75.00</i>
Donations <i>(per receipt)</i>	1.50	Pension Income Splitting <i>(per person)</i>	15.00
Manitoba Provincial Tax Credit	10.50	T776 Rental Activities	As quoted
Medical Expense Schedule	<i>starting at 15.00</i>	T2125 Business Activities	As quoted
Moving Expense Schedule	<i>starting at 35.00</i>	Other Credits	As applicable

Talbot & Associates reserves the right to change our fees at any time without prior notification. Our fee schedule does not include consulting and preliminary tax calculations, which will be charged accordingly based on time spent. Fees do not include processing reviews or audits.

A surcharge will apply if we receive any additional slips after completion of your tax return. A surcharge may also apply if the information to prepare your income tax return is received after **April 17<sup>th</sup>, 2021**.