

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 (per slip)	6.50
T3 (per slip)	8.95	Tuition Fee Schedule	8.95
T4 (per slip)	8.95	Transfer of Tuition Fee from a Student	starting at 10.50
T5 (per slip)	8.95	Paper File Return (*)	40.00
T4A (P) / T4A (OAS) & most other T-slips (per slip)	8.95	Fitness Tax Credit	10.50
Capital Stock Transaction (per transaction)	5.50	Children's Arts Amount	10.50
Child Care Expense Schedule	15.00	T1 Adjustments	starting at 75.00
Donations (per receipt)	1.50	Pension Income Splitting (per person)	15.00
Manitoba Provincial Tax Credit	10.50	T776 Rental Activities	As quoted
Medical Expense Schedule	starting at 15.00	T2125 Business Activities	As quoted
Moving Expense Schedule	starting at 35.00	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 17th, 2021**.