

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
Alimony or child support
Moving expenses
Employment expenses *(automobile and home office)* -
Please provide a signed T2200 form from your employer
Prior year losses

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 18th, 2022**.