

**WILLINGTON MARTIN PROFESSIONAL CORPORATION
INDEPENDENT MEMBER FIRM
PORTER HETU INTERNATIONAL**

2011 PERSONAL INCOME TAX RETURN CHECKLIST

This checklist assists you in gathering the most common categories of information needed to prepare your personal income tax return. Many of you have unique situations that may not be listed here such as disability claims. If you require more detail or are in doubt, please call Jill or Theresa at 416-848-1585.

Send us your package of materials as soon as possible!!

We can give the best possible service when we receive your material as soon as you have received all of your slips. For added convenience we accept scanned electronic materials; these can be sent via electronic upload using your login and password or email; ***all at once is preferred***. Traditional methods such as mail, courier, or hand-delivery are fine too. Our office is open from 8:30 until 5:00. If you need to drop your information off other than during these hours, please call ahead to make arrangements. If you mail your information, we recommend Canada Post's express service. Please confirm that we have received your package by calling Marilyn at 416-848-1585 x3.

**All T-Slips
Miscellaneous Income
Capital Gains and Losses**

T3, T4, T5, T4RSP, T4A, T5013, T5008 etc.

You are required to self-report income that does not have a T-slip
Copies of non-registered (i.e. *non*-RRSP/RRIF brokerage statements, mutual fund summaries, and year-end summaries) statements showing details of stock and mutual fund unit sales indicating the **proceeds and the cost**

**Rental income and expenses
Self-Employment Income and expenses
GST/HST filing forms if applicable
RRSP contribution slips, childcare,
professional and union dues
T2200 and eligible employment expenses
Interest on debt used for business
or investment purposes
Money management fees, safety
deposit box
Medical/Dental/Health expenses**

TIP – get an annual statement from your pharmacy or health practitioner which shows your total charges for 2011. We can use this instead of individual slips.

Include any insurance plan premiums you pay personally

**Childrens' fitness and art credit receipts
Monthly transit passes
Charitable and Political donation receipts
Tuition Fees and student rent receipts
2010 Notice of Assessment/Reassessment
Income Tax Installments paid**

Form T2202 and T2202A form(s) must be signed by student

NEW CLIENTS

Copy of your 2010 income tax filing and 2010 Notice of Assessment

DIRECT DEPOSIT

Set this up at the CRA website at www.cra-arc.gc.ca/menu-e.html in "My Account" (under Online services) **if** you want to do this yourself