

KEVIN K. YIP, CGA			Wait for Info:	All Info Rec'd:		
2007 Income Tax Preparation Checklist			Anticipated completion date:			
Client:			Efile / Paper			
Address:			Interviewed by:	Name	Date	Time
			Prepared by:			
Tel:			Reviewed by:			
Cel:			T1135:			
Fax:			T1134B:			
Off:			Auto/Home Confirmation			
SIN:			Total time:			
Email:			Misc. addn'l charges:			
Special Note:						
for Auto (1):Total Mileage _____, Mileage to earn income km/%_____.						
for Auto (2):Total Mileage _____, Mileage to earn income km/%_____.						
I/J	H	W	Information Received		Comments	
Qty	Qty	Qty				
			Family			
			Changes in Address / Marital Status / Tel.			
			Birth Dates			
			Marital Status / Equivalent to Spouse			
			Date of Landed or Departure (photocopy required)			
			New Baby Birth Date or Person's Date of Death			
			Dependents (fill out dependant information form)			
			Tax Info.			
			Previous years Notices of Assessment / RRSP info.			
			1994 Capital Gain Exemption Info.			
			Direct Deposit Information			
			Alimony/Maintenance Payments			
			Rent/Property Taxes			
			Self-employment (worksheet required)			
			Foreign Assets > \$100,000.00 (T1135 required)		H/I Yes or No	W Yes or No
			Foreign company shares (T1134B required)		Financial Statement received Yes or No	
			Tax Instalment Payments Made			
			M/Y Public Transit Pass and Receipts			
			Disability Credit (Forms) / Infirm Dependent over 18			
			Pension Income Splitting (T1032)			
			Caregiver Amount			
			Tuition/Education/Textbook Credits (T2202A)			
			Children's Fitness Tax Credit for 16 and under (<\$500)			
			Medical Expenses			
			Charitable Donations			
			Adoption Expenses			
			Trades peoples' Tool Expenses			

I/J	H	W	Information Received	Comments
			<i>Income</i>	
			Information Slips:	
			T4 Employment Income	
			T5 Investment Income	
			T3 Trust Income	
			T4A Pensions and Other	
			T4A(P) CPP Income	
			T4(OAS) Old Age Security	
			T4E Employment Insurance Benefits	
			T4RSP RRSP Withdrawals	
			T4RIF RRIF Withdrawals	
			T5007 Social Benefits Payments	
			T5008 Securities Transactions	
			T5013 Partnerships	
			RC62 Universal Child Care Benefit	
			Rental Income and Expenses	Income: _____ Exp: _____
			Capital Dispositions (shares / other capital)	
			Foreign Employment / Pension	
			Foreign Interest / Dividend / Capital Gain	
			Foreign Tax Slips / Supporting Documents	
			<i>Deductions</i>	
			RRSP Receipts	
			Past Service Cont. to RPP	
			Professional Dues	
			Child Care / Attendant Care receipts	
			Children's Fitness Tax Credit receipts	
			Details on Business Losses	
			Moving Expenses	Date, address, distance:
			Spousal & Child Support Payments	
			Carrying Charges	S.D.B.
			Employment Expenses (T2200 required)	
			EI Repayments	
			Clergy Residence (T1223E required)	
			Carry Forwards from Prior Years	
			<i>Other Credits/Payables</i>	
			Labor-Sponsored Funds Tax Cr	
			GST Rebates Received	
			Tax Reassessments	
			RESP or RDSP	
			Other Issues:	
			Family Tax Planning	
			Estate Tax Planning	
			Business Tax Planning	
			Pre-Retirement Tax Planning	
			Prior Filed Adjustments Needed:	