



Interior Tax & File

SMALL BUSINESS SERVICES INC.

245 - 1855 Kirchner Rd., Kelowna, BC V1Y 4N7
 Phone 250.762.6604 Toll Free 1.888.762.6604

Personal Income Tax Checklist

PERSONAL INFORMATION	YEAR:
Name:	Spouses Name:
SIN:	SIN:
Birth Date:	Birth Date:
Address:	City:
Province:	Postal Code:
Phone:	Country:
Email:	

CHILDREN'S INFORMATION	
Name	Birth Date:
Name	Birth Date:
Name	Birth Date:

INCOME	Yes	No
Employment Income (T4)		
Old Age Security (T4OAS)		
CPP/QPP (T4P)		
Other Pension Income (T4A)		
Foreign Pension Income		
EI Benefits (T4U)		
Interest or Divident Income (T5)		
Canada Savings Bonds (T600, T5)		
Trust Income (T3)		
Foreign Source Income		
Income from Limited Partnerships		
RRSP Income (T4RSP)		
RRIF Income (T4RIF)		
Retiring Allowance (T4A)		
Self-employment Income / Expenses*		
Rental Income / Expenses		

DEDUCTIONS	Yes	No
RRSP Contributions		
Union or Professional Fees		
Tuition Fees / Dependant Tuition		
Medical Expenses		
Charitable Donations		
Safety Deposit Box Rental		
Accounting / Investment Fees		
Political Contributions		
Installment Tax Payments		
Moving Expenses		
Investment Loan Costs		
Rent / Property Tax		
Employment / Auto Expenses **		
Home Office Expenses ***		
Childcare Expenses ****		
Other:		

Please include your prior year Notice of Assessment (or prior year Income Tax Return)

