

WK Accounting & Income Tax Corporaton

CLIENT/INTERVIEW T1 CHECK LIST

wajahatkhan1@gmail.com

Name	Date of Birth	
Name	Date of Birth	
Name	Date of Birth	
Name	Date of Birth	

Identifying Factors	Person -1	Person 2	
Personal information			
Last Year Notice of Assessment (Bring all pages)	<input type="checkbox"/>	<input type="checkbox"/>	
Any re-assesment (Bring all Pages)	<input type="checkbox"/>	<input type="checkbox"/>	
Paid installments of taxes	<input type="checkbox"/>	<input type="checkbox"/>	
Dependent Childrens	<input type="checkbox"/>	<input type="checkbox"/>	
Marital Status M F	<input type="checkbox"/>	<input type="checkbox"/>	
Spouse	<input type="checkbox"/>	<input type="checkbox"/>	
Change of address	<input type="checkbox"/>	<input type="checkbox"/>	
Email address	<input type="checkbox"/>	<input type="checkbox"/>	
Employment Income			
Regular Income (all T4)	<input type="checkbox"/>	<input type="checkbox"/>	
Tips & other income	<input type="checkbox"/>	<input type="checkbox"/>	
Director's Fee	<input type="checkbox"/>	<input type="checkbox"/>	
Profit sharing income (T4PS slips)	<input type="checkbox"/>	<input type="checkbox"/>	
Others	<input type="checkbox"/>	<input type="checkbox"/>	
PENSION, RETIREMENT, ANNUITY INCOME			
Old Age Security	T4A(OAS)slip	<input type="checkbox"/>	<input type="checkbox"/>
Canada Pension	T4A(P)	<input type="checkbox"/>	<input type="checkbox"/>
Foreign income	foreign slip	<input type="checkbox"/>	<input type="checkbox"/>
Employment (including retiring allowance)	T4A	<input type="checkbox"/>	<input type="checkbox"/>
Registered Retirement income Fund	T4RIF	<input type="checkbox"/>	<input type="checkbox"/>
Withdrawal from RRSP	T4RSP	<input type="checkbox"/>	<input type="checkbox"/>
Withdrawal/repayment to RRSP-Home Buyer plan		<input type="checkbox"/>	<input type="checkbox"/>
Withdrawal/repayment to Life Long Learning Plan		<input type="checkbox"/>	<input type="checkbox"/>
Investment Income			
Interest / Term Deposite/ GIC / Mutual Fund/ Dividend	T5	<input type="checkbox"/>	<input type="checkbox"/>
Interest - mortgage or other Loan	T5	<input type="checkbox"/>	<input type="checkbox"/>
Foreign Interest/ Royalty / Others		<input type="checkbox"/>	<input type="checkbox"/>
Partnership Income	T3013	<input type="checkbox"/>	<input type="checkbox"/>
Others	T5008	<input type="checkbox"/>	<input type="checkbox"/>
Income From Self-Employment			

General (record all revenue and expenses)				
Assets Purchased, sold during year				
Salary paid				
Inventory				
Accounts Payable/ Accounts Receivable				
Others (give details)				
Others (give details)				
Others (give details)				
Rental Income				
General (revenue / expenses)				
Rental part of residency				
Other Income				
Employment Insurance Benefits	T4E			
WCB Benefits	T4, T5007			
Social assistant payments	Slips			
Scholarships, bursaries				
Universal Child Care benefits	RC62			
RESP Income	T4A-RESP			
Others				
Others				
Commission Related Expenses				
Employment Related Expenses				
Moving Expenses				