

WK Accounting & Income Tax Corporation

Please complete and bring with you all relevant tax documents

CLIENT/INTERVIEW T1 CHECK LIST

info@wktaxservices.ca

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)	□	□
Any re-assessment (Bring all Pages)	□	□
Paid installments of taxes	□	□
Dependent Childrens	□	□
Marital Status	M	F
Spouse	□	□
Change of address	□	□
Email address	□	□
Employment Income		
Regular Income (all T4)	□	□
Tips & other income	□	□
Director's Fee	□	□
Profit sharing income (T4PS slips)	□	□
Others	□	□
PENSION, RETIREMENT, ANNUITY INCOME		
Old Age Security	T4A(OAS)slip	□
Canada Pension	T4A(P)	□
Foreign income	foreign slip	□
Employment (including retiring allowance)	T4A	□
Registered Retirement income Fund	T4RIF	□
Withdrawal from RRSP	T4RSP	□
Withdrawal/repayment to RRSP-Home Buyer plan	□	□
Withdrawal/repayment to Life Long Learning Plan	□	□
Investment Income		
Interest / Term Deposite/ GIC / Mutual Fund/ Dividend	T5	□
Interest - mortgage or other Loan	T5	□
Foreign Interest/ Royalty / Others	□	□
Partnership Income	T3013	□
Others	T5008	□

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
 WCB Benefits
 Social assistant payments
 Scholarships, bursaries
 Universal Child Care benefits
 RESP Income
 Others

T4E
 T4, T5007
 Slips

 RC62
 T4A-RESP

Others

Commission Related Expenses
 Employment Related Expenses
 Moving Expenses
