

Office Use Only	
Client Number	
Date Received	



Aries Accounting  
 877 Anders Road  
 West Kelowna, BC V1Z 1K2 Phone: 250-454-9483

## 2015 INCOME TAX CHECK LIST

Name: \_\_\_\_\_ Birthdate: yyyy/mm/dd \_\_\_\_\_ SIN: \_\_\_\_\_

Spouse Name: \_\_\_\_\_ Birthdate: yyyy/mm/dd \_\_\_\_\_ SIN: \_\_\_\_\_

Marital Status: Married / Single / Divorced / Separated /  
 Widowed / Common Law \_\_\_\_\_ Did this change in 2015? If yes, please provide date. \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Primary Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### Names of Dependents:

Name	Birthdate	SIN	Fitness/Arts Credit	
			Yes <input type="checkbox"/>	No <input type="checkbox"/>
			Yes <input type="checkbox"/>	No <input type="checkbox"/>
			Yes <input type="checkbox"/>	No <input type="checkbox"/>
			Yes <input type="checkbox"/>	No <input type="checkbox"/>

### Income – Receipts and Information Required

- |  |   |
|--|---|
| <input type="checkbox"/> Salaries, Commissions (T4, T4A slips)<br><input type="checkbox"/> Pension Income - OAS/ CPP / Other<br><input type="checkbox"/> EI Benefits<br><input type="checkbox"/> Investment Income (T3, T5 slips)<br><input type="checkbox"/> Universal Child Care Benefits (RC62)<br><input type="checkbox"/> Rental Income <input type="checkbox"/> Yes <input type="checkbox"/> No<br><input type="checkbox"/> Other _____ (Attach details) | <input type="checkbox"/> Taxable Capital Gains/Losses (Details of Cost/Sale price)<br><input type="checkbox"/> RRSP Income (T4RRSP slips)<br><input type="checkbox"/> RRIF Income (T4RRIF slips)<br><input type="checkbox"/> Partnership Income (Attach details)<br><input type="checkbox"/> Self-Employed <input type="checkbox"/> Yes <input type="checkbox"/> No (Attach income details)<br><input type="checkbox"/> Trades Grant (BC proof of completion) |
|--|---|

### Deductions – Receipts and Information Required

- |   |  |
|---|--|
| <input type="checkbox"/> Childcare Expenses (Attach details)<br><input type="checkbox"/> Child Fitness and Arts Expenses (Attach receipts)<br><input type="checkbox"/> Moving Expenses (Provide receipts and details)<br><input type="checkbox"/> Extended Health Benefits (Not MSP)<br><input type="checkbox"/> Medical & Dental Expenses (Pharmacy Printout)<br><input type="checkbox"/> Charitable/Political Donations (Official Receipts)<br><input type="checkbox"/> Interest Paid on Student Loans (Attach Stmt)<br><input type="checkbox"/> Other _____ (Attach details) | <input type="checkbox"/> RRSP Contributions (T4, Official Receipts)<br><input type="checkbox"/> Union or Professional Dues (T4 slip, Official Receipts)<br><input type="checkbox"/> Employment Expenses (if applicable)<br><input type="checkbox"/> Interest/Carry Charges<br><input type="checkbox"/> Pension Income – Split to Spouse (Attach Details)<br><input type="checkbox"/> Education: Tuition (T2202 Slip)<br><input type="checkbox"/> Public Transit Passes Amount (Transit Pass & Receipt) |
|---|--|



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## Other Information

- 2015 Instalments paid (CRA Stmt)
- Notice of Assessment from 2014 (All pages)
- Prior year tax return (if this is the first year of Aries filing your taxes)
- RRSP Home Buyer's Withdrawal (Provide details)
- First Time Home Buyer (Provide legal documents)
- Northern Resident Deduction (Must have lived in prescribed zone for at least 6 months)

Are you a Canadian Citizen? Yes  No

If yes, do you allow CRA to release information about you to Elections Canada? Yes  No

Do you own foreign assets worth more than \$100,000?  
If yes, please provide details. Yes  No

Are you a US Citizen? If yes, you may be required to file a US tax return. Yes  No

Were you **OR** your parents born in the US?  
If yes, you may be required to file a US tax return. Yes  No