

PERSONAL INCOME TAX CHECKLIST

Please call us if you have questions and when you are ready to make an appointment to bring your information to us

B. Lyons & Company Inc.

350 East 23rd St

North Vancouver, B.C. V7L 3E5

Tel: (604) 649-9199 Fax: (604) 985-3919

Email: accountant@lyons.pro

Name(s) _____

Email: _____

Address (if new): _____

Phone: _____

Tax slips (Income)	
	Last year's notice of assessment
	T4 – employment income
	T4A – contract, pension, annuity & miscellaneous income
	T4E – employment insurance & other benefits
	T4A(P) – Canada Pension Plan
	T4A(OAS) – Old Age Security
	T4RIF – RRIF income
	T4RSP – RRSP withdrawals
	T5007 – Workers Compensation & other benefits
	RC62 – Universal Child Care Benefit
	If you have foreign source income please discuss with us

Investment income & expense (non registered accounts only)*	
	T3's – Mutual funds and trusts
	T5 – Investment (Interest/dividend) income
	T5008 –Securities transactions (stocks, bonds, mutual funds)
	T5013 – Partnership income
	T600 – Canada Savings Bonds
	Brokerage account statements for the year (all)
	Do you own Tbills, strip bonds, CSB's, longterm bonds?
	Other investment income or expenses
	Safety deposit box fees
	Accounting, management, investment counsel fees
	Interest on investment loans
	Did you sell real estate held for investment (eg rental)?
	Foreign assets with a ACB greater than \$100,000 CDN?
	If you have foreign investments please discuss with us
	*No need to report RRSP, RESP, RRIF, TFSA income

Other income & expenses	
	Alimony/Child Support
	Tuition (T2202)
	Medical/Dental
	Charitable Donations
	Moving expenses (40km or more closer to work/school)
	Child care receipts (name/address/SIN of individuals)
	Professional/union dues

Self employment (no financial statements prepared)	
\$	Revenue
\$	Purchases
\$	Direct wages & benefits
\$	Subcontracts
\$	Other direct costs
\$	Advertising & Promotion
\$	Bad debts
\$	Convention fees
\$	Details of sold or scrapped equipment
\$	Interest, bank charges
\$	Legal & accounting
\$	Licenses, dues & subscriptions
\$	Meals & entertainment
\$	New Equipment (provide invoices)
\$	Occupancy costs
\$	Office supplies & expenses
\$	Private Health Service Plan (PHSP) premiums
\$	Repairs & maintenance
\$	Supplies (other than office)
\$	Telephone, internet, cable (business use)
\$	Travel & accommodation (no meals)
\$	Other (please specify)

Please use our Excel template to summarize expenses	
Auto expenses	
Business kms _____ Total kms _____	
\$	Gas & oil
\$	Insurance & registration
\$	Loan interest
\$	Lease payments (_____/month)
\$	Maintenance & repairs (include BCAA)
	Lease start date _____ End _____
	Purchase date _____
\$	MSRP of new auto (lease or purchase)
\$	Trade in/Sale price

\$	Children's fitness/arts receipts (5days/8weeks)
\$	Public Transit receipts

Rental income (please provide details by property) # units	
	Co-owned?
Address of property	
\$	Rent collected
\$	Advertising
\$	Insurance
\$	Maintenance & repairs
\$	Mortgage interest
\$	Property taxes
\$	Utilities
\$	Travel (if own more than one property)
\$	Office expenses & supplies
\$	Legal/professional/accounting fees
	Suite in home? Rental SqFt _____ Total SqFt _____

Home office _____ SqFt Home _____ SqFt	
Employee (bring form T2200 signed by your employer)	
\$	Rent
\$	Maintenance
\$	Hydro
\$	Gas
\$	Water
\$	Other (please provide details separately)
Commission Employees (T2200 signed by employer)	
\$	Insurance
\$	Property taxes
Business use of home (self employed/corporate office)	
\$	Mortgage Interest

Employment expenses (T2200 signed by your employer)	
\$	
\$	
\$	
\$	
\$	

\$	Tax instalments paid
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