CC&C Professional Corporation Chartered Accountants
2010 CANADIAN PERSONAL INCOME TAX CHECKLIST

This checklist is provided to assist you in assembling information necessary to prepare your 2010 income tax return. Please complete the checklist carefully and enclose additional information and slips as requested. The checklist and supporting documentation should be returned with your information to ensure the accurate completion of your return

Special attention should be paid to the Capital Gains history and Actual Disposals in the 2010 section of this questionnaire.

TAXPAYER'S FULL NAME

TAXPAYER'S ADDRESS

SOCIAL INSURANCE NUMBER

DATE OF BIRTH

ANY CHANGE OF ADDRESS SINCE 2009

REVENUE CANADA QUESTIONS

The following questions appear on 2010 income tax returns. Please indicate a "Yes" or "No" response.

Do you agree to Revenue Canada providing your name, address and date of birth to Elections Canada to help keep up to date your information currently on the National Register or Electors? YES ( )... NO ( )

Did you own or hold foreign property at any time in 2010 with a total cost of more than $100,000 CAN?...........YES( ).........NO( )

2010/2011 TAX PLANNING NOTES

1)Review any 2010/2011 instalments that were recommended payable in March, June, September and December of 2010.
2)Review any expenses that may be deductible from commission or business income and keep all vouchers and receipts.
3)Review 2010/2011 RRSP contributions based on 2009 contribution limits and prior year carry forwards.

4)Review any changes in your family status that will affect 2010 non-refundable credits.

5)Review and keep copies of all medical and donation receipts for 2009/2010.

6)Review any income that may affect clawback calculations that may affect 2010 OAS or other Social Benefit Repayments for 2011.

7)Was a RRSP Homebuyers or Education withdrawal made in the tax year? Please provide amount and date.

8)Do you have a Tax Free Savings Account.

CHECK IF APPLICABLE

CHANGES FROM PRIOR YEAR'S RETURN

Current address and telephone number .... ( )

Marital status and date of change .... ( )

Name, Sex and Date of Birth if you had a child born during the year .... ( )

If married during the year give spouse's S.I.N., Date of Birth & (address if different)................................ ( )

If we are preparing spouse's return, provide copy of spouse's 2009 return and Notice of Assessment. ( )

Residency - dates of entry to or departure from Canada.. ( )

EMPLOYMENT INCOME

Attach all T4 and T4A slips ....( )

Tips, casual earnings, adult training allowances, etc.(give details) .... ( )

Low interest or interest-free loans if not on T-4 (give details) .... ( )

Benefit (i) Personal use of company auto (ii) company-owned residence if not on T4 slip (iii) other .... ( )

INVESTMENT INCOME

Dividends and Interest (attach T5 or T3 slips) .... ( )

Canada Savings Bond interest (attach T600 slip or T5) .... ( )

Mortgages (provide full details including amount of interest received) .... ( )

Any other interest received (details including name of payer and amount)... ( )

FAILURE TO REPORT ALL T3 AND T5 SLIP INCOME MAY RESULT IN A PENALTY OF TAX AND INTEREST.

RENTAL INCOME

If a current statement is not prepared by us, give address, rents and expenses, number of rental units and purchase and financing details for each property .... ( )

SELF-EMPLOYMENT

State type of business; if current financial statement not prepared by us, attach complete details of revenues and expenses .... ( )

If we did not complete your 2009 return, include a copy of the reserve calculation (form T1139) claimed in 2009 so we may carry the correct amounts forward for future returns.. ( )

Indicate the principal product manufactured, sold or services provided, giving the approximate percentages of total revenue.. ( )

If the business has employees, give employer's remittance number... ( )

Indicate amount of wages paid to spouse (or income allocation if a Partnership)....................................... ( )

Provide complete details of any capital assets acquired or disposed of.. ( )

E.H.T. instalment paid in 2010 if applicable.. ( )

OTHER INCOME

Old Age Security, Canada, Quebec or other pension or superannuation(attach T4A (OAS), T4A(P) and/or T4A slips or give details).. ( )

Employment Insurance Benefits (attach T4E slips).. ( )

Alimony, separation allowance, annuity payments, royalties, trust income, profit sharing, stock options, retiring allowance, supplementary U.I. benefits, director's fees, scholarships, research grants and other (attach slips or give details).. ( )

Withdrawal of RRSP or RRIF funds (attach T4RSP and T4RIF) .... ( )

Income from sources outside Canada (give details of interest, dividends etc. and foreign taxes withheld, if any)..... ( )

Provide details of any welfare and other social assistance payments, guaranteed income supplements, spouse's allowance and worker's compensation payments received(T5007) .... ( )

Seniors Ontario Property Tax Payment received.

Universal Child Care Benefit (RC62)

CAPITAL GAINS EXEMPTIONS AND ACTUAL DISPOSALS DURING 2010

Provide details for every sale of property (or right to property) including description, date of acquisition and disposal, any major improvements, original cost, proceeds on disposition and Legal expenses:

Provide details for every sale of personal property including gold, silver, commodities, jewellery, works of art, rare books, stamps or coins .... ( )

In 2001 and prior years, if you did elect to crystallize capital gains – details? .... ( )

Indicate if you incurred a loss on the disposal of shares or debt of a Canadian controlled private corporation ( )

Indicate if you transferred shares of a small business corporation or farm to your children or grandchildren ( )

Indicate Capital Gains and Losses since 1985 and any capital gains exemptions or crystallisations claimed ( )

Indicate exact date of all 2010 capital gains and losses ( )

SPOUSE'S INCOME

If spouse's return is prepared by us, *complete a separate checklist*. .... ( )

If spouse does not normally file a tax return, attach all tax slips and other details for spouse's 2010 income and deductions .... ( )

If your spouse's return is prepared by others, provide a copy of the return .... ( )

MEDICAL AND DENTAL EXPENSES

Enclose receipts for all expenses paid and not reimbursed from a plan for self, spouse and dependants. If this is your first tax return prepared by us, enclose receipts of any expenses not claimed in 2009........ ( )

Amount of premiums paid to non-government medical or hospital care plans (eg. Blue Cross). Receipts are not required: $____________________ Name of Plan .... ( )

Provide name, address, relationship and net income of any dependants that you wish to claim expenses for ( )

Do you (or your spouse) have medical and disability........ ( )

OTHER PAYMENTS MADE IN 2010

Safety deposit box rental: $ .... ( )

Investment counsel and accounting fees: $ .... ( )

RRSP contributions up to March 1, 2011 and pension contributions up to December 31, 2010. (enclose receipts)........ ( )

Confirmation of your RRSP limit from Revenue Canada (Please enclose your 2009 Notice of Assessment) ... ( )

Union, professional and other similar dues (enclose receipts) .... ( )

Alimony or separation allowances (attach details and amounts paid) .... ( )

Repayment of overpaid EI benefits, CPP benefits, etc........ ( )

Federal and provincial political contributions (enclose receipts) .... ( )

Charitable donations (attach official tax receipts for 2010)........ ( )

Tuition fees over $100 in total from each institution (enclose receipts and have form T2202A or form T2202 completed if in full-time attendance)........ ( )

Student Loan Interest ( )

Moving expenses (attach complete details of all expenses and distance relocated, complete form T1-M) ...... ( )

Employee travel, home office and other expenses not reimbursed by your employer (attach complete details of all expenses including capital cost of automobile and have employer complete form T2200) .... ( )

Deduction for tools acquired by apprentice vehicle mechanic to a maximum of $500 ( )

Public Transit Passes ( )

OTHER PAYMENTS MADE IN 2010 – CONT'D

Gifts made to governments or institutions (attach details showing date, recipient's name and address, amount and nature of gift).. (   )

Salesman's expenses incurred in earning commission income as an employee (attach details) Include form T2200 signed by your employer.. (   )

Child care expenses incurred (please provide receipts with the amount paid, the date of payment and the name, address, and Social Insurance Number of the individual who has provided these services)........................ (   )

Child care expenses include all costs of babysitting, day nursery care and lodging paid to boarding schools and camps. Please provide receipts and details as to the nature of these expenses and the number of weeks spent at a boarding school or camp.. (   )

Child care expenses may be deducted for children who are (16) sixteen years of age or younger and those who are (16) sixteen years of age or older and have a physical or mental impairment.

Children's fitness credit, maximum $500 may be claimed for children registered in a physical activity class. (   )

First time home buyers non-refundable credit of 15% based on $5000 (Max $750) is available for qualifying homes acquired after January 27, 2009.

Provincial rental and property tax credits (applicable for residents of Ontario, Manitoba and Alberta). Indicate residence address, number of months residence, rental payments in 2010 name of landlord, property taxes paid in 2010 name of municipality taxes paid to... (   )

NOTE: The following two points may be overlooked. Please read them carefully as they are a deduction on your personal tax return.

Disability deduction (for severely impaired mentally or physically), complete form T2201 if claiming for the first time.. (   )

Students may also be eligible for moving expenses. Provide details .... (   )

TAX SHELTER INVESTMENTS

Attach details of all continuing and new tax shelter investments including purchase agreements, financial statements, certificates, etc. for any such shelters .... (   )

Please also attach any T5013 slips... (   )

MISCELLANEOUS INFORMATION

If this is your first return prepared by us, please enclose copies of:

1) your 2007 to 2009 returns:.. (   )
2) assessment and reassessment notices and other documents received from Revenue Canada for the 2007 to 2009 taxation years.. (   )
3) If you have made income tax instalments (other than as shown on T4 slips) attach all interim and final receipts or provide details.. (   )

FOREIGN INVESTMENTS

1) Do you have a foreign investment with a Canadian dollar value greater than $100,000................. (   )

   A special filing may be needed for 2010 – Ask for details.

ELECTRONIC FILING

You may be eligible in 2010 to EFILE your return. Form T183 will be required to be kept on file.

If you EFILE in 2010 you **must** keep all information slips, schedules, receipts, documentation and other records which we used to prepare your 2010 income tax return.

If you do **not** wish to have your return submitted by EFILE, please advise us when submitting your 2010 tax information.. (   )

If you have any questions regarding this checklist, please do not hesitate to contact us.

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