



Our Personal Tax Return Checklist is designed to help you make this process as easy and efficient as possible. It also assists us in ensuring that we have information that is as complete and accurate as possible to ensure your taxes are minimized and correctly reported. Please review the checklist and put together the relevant slips and information. You can attach the slips and send in a hardcopy or scan the information to your service contact here at Blue Ocean.

**PERSONAL INFORMATION** (If we prepared your \_\_\_\_\_ return, please complete ONLY if there is a change)

Name	SIN	Birth Date (yyyy/mm/dd)	Telephone	Email Address		
Taxpayer _____	_____	_____	_____	_____		
Spouse _____	_____	_____	_____	_____		
Address _____						
Marital Status	Married	Single	Common-law	Separated	Divorced	Widowed

**RESIDENCE**

Province or territory of residence on December 31 \_\_\_\_\_

Did you immigrate to Canada or emigrate from Canada during the past ten years? Yes No

If in the past year, provide date of entry into Canada (yy/mm/dd) \_\_\_\_\_ or date of departure (yy/mm/dd) \_\_\_\_\_

Foreign source employment income for you in (yyyy) \_\_\_\_\_ amount in Canadian Dollars \$ \_\_\_\_\_

Foreign source employment income for your spouse in (yyyy) \_\_\_\_\_ amount in Canadian Dollars \$ \_\_\_\_\_

**FOREIGN REPORTING**

Do you own foreign assets outside your RRSP (other than personal use assets) with a cost greater than \$100,000? Yes No

**DEPENDANTS** (unless unchanged, please provide)

Name	Birth Date (yyyy/mm/dd)	SIN	Relationship

Did you dispose of your principal residence during the year? Please provide details of and/or documents for purchase and sale Yes No

**RRSP CONTRIBUTIONS AND OTHER CREDITS**

Did you make any RRSP Contributions? Attach receipts (including first 60 days of year \_\_\_\_\_) Yes No

RRSP – Home Buyers’ Plan withdrawals and repayments; RRSP – Lifelong Learning Plan repayment? Please provide details Yes No

Employment expenses (Form T2200 signed by employer), including tools? Yes No

Tuition fees for yourself? (Form T2202A) Yes No

Tuition fees for your dependent? (Form T2202A signed by student) Yes No

Medical expenses (including travel insurance, Gluten-free products, etc.)? Yes No

Charitable donations? Yes No

Contribution to First-Time Home Buyer Account (FHSA) Yes No

Are you eligible for the Home Buyer’s Amount? (You and your spouse have neither owned or lived in a home in the year of purchase or in the four preceding years) Yes No

**BANKING INFORMATION** (for direct deposit of tax refund)

	Branch Number 5 digits	Institution Number 3 digits	Account Number 12 digits
For You	_____	_____	_____
For Your Spouse	_____	_____	_____