



blend

GROUP OF COMPANIES

401-3301 8th Street
E.Saskatoon, SK. S7H 5K5
S7H 5K5

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www.BlendGroup.ca

Personal Tax Checklist

First and Last Name:

Phone Number and Email:

PERSONAL INFO

- ❖ Full Name, Date of Birth, SIN ☐
- ❖ Info about Spouse/Common Law ☐
- ❖ Info about Dependents ☐
- ❖ Spouse and/or Child Net Income ☐
- ❖ Tuition Transfer Amounts Spouse/Child ☐
- ❖ Last Year's Tax Return ☐
- ❖ Last Year's Notice of Assessment ☐
- ❖ Total of Installment Payments to the CRA ☐
- ❖ Other CRA Correspondence ☐
- ❖ Loans of Gifts of Money to Spouse/Child ☐

INCOME

- | | |
|--|--|
| ☐ Employment Income | ☐ Interest, Dividends, Mutual Funds |
| ☐ Self Employment Income | ☐ Workers Compensation Benefits |
| ☐ RRSP and RIF Income | ☐ Employment Insurance Benefits |
| ☐ Social Assistance Benefits | |
| ☐ Pension and Annuity Income | |
| ☐ Rental Income and Expenses | |
| ☐ Old Age Security and CPP Benefits | |
| ☐ RL-1 Employment and other income | |
| ☐ Other Income not reported on a slip | |

RECEIPTS

- | | |
|--------------------------|--|
| ☐ | RRSP Contributions |
| ☐ | Employment Expenses |
| ☐ | Work Related Tool Expenses |
| ☐ | Union Dues if not included on T4 |
| ☐ | Exams for professional certification |
| ☐ | Teacher School Supplies |
| ☐ | Childcare Expenses |
| ☐ | School payments made or received |
| ☐ | Adoption expenses |
| ☐ | Disability tax credit (self or dependents) |
| ☐ | Personal medical expenses |
| ☐ | Personal attendant/facility care expenses |
| ☐ | Charitable donations |
| ☐ | Northern residents deductions |
| ☐ | Digital News subscriptions |
| ☐ | Political contributions |
| ☐ | Moving expenses |
| ☐ | Home accessibility expenses |
| ☐ | Personal attendant/facility care expenses |
| ☐ | Home Buyers amount |
| ☐ | Tuition expenses |
| ☐ | Student loan interest amounts |
| ☐ | Tax-exempt scholarships |

OTHER

- Sale of residence
- Sale of stocks, bonds, or other property
- RRSP deduction limit/unused amounts
- Tuition carry forward amounts
- Loss carry forward amounts
- Other carry forward amounts

Once Completed, please drop it off at
401, 3301 8th Street East,
Email to Kendal@IAPrivateWealth.ca
Or fax to (306) 808-3949

If you have any questions you can call (306) 808-3948 or visit www.BlendGroup.ca