

Professional Management Services

A Division of 812708 Ontario Limited

March 2010

Dear Client;

Tax season is here again and now is the time to start planning for the preparation of your **2009 Income Tax Return**. The deadline for filing 2009 returns is **April 30, 2010**.

We enclose a checklist which, while not intended to be an exhaustive list of all Income Tax situations, should assist you in assembling your information. If followed and submitted with your information, the completed checklist should expedite the processing of your return and reduce the possibility of errors and omissions. After you have assembled the information and completed the checklist, contact our office to arrange an appointment, or just drop off your information.

If you are waiting for only one information slip, and know the amount, please provide all other information with a note reporting the missing information so that we can begin to process the return.

We appreciate your business and look forward to serving you once again this tax season.

Yours truly,

Rick Shadbolt

339 Main Street North Markham, Ontario L3P 1Z2
(905) 201-8073 phone (905) 201-8063 fax
profmgmt@rogers.com e-mail

Do you wish to continue receiving these tax information packages? () Yes () No

Have you moved in the past year? If so, please be sure to let us know.

Tax Information Sheet

1. Name: _____

2. Status: () Married () Common Law () Separated () Divorced () Single

Date of Change in Marital Status: _____

Children: _____ Birthdate: _____

_____ Birthdate: _____

_____ Birthdate: _____

Dependants: (other than children)

Name: _____ Relationship: _____

Address: _____

Is any family member mentally or physically impaired? () Yes () No

Did your family receive Child Tax Benefit? () Yes () No

Are any family members bankrupt? () Yes () No

Did any family member make Income Tax Installments this year? () Yes () No

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Ontario Property Tax Credit

If you own a house: Total property Taxes paid for the year: \$ _____

If you rent: Total rent paid during the year: \$ _____

The total above should be for your principal residence only

Who is rent paid to? _____

Items required for the past calendar year for your Tax Return:

- | | |
|---|--|
| _____ Charitable donation receipts | _____ Medical expense receipts |
| _____ T4 and T4A Supplementary slips | _____ Child Care receipts |
| _____ RRSP Contribution receipts | _____ Home Buyers Plan Statement of Account |
| _____ Grants or other Financial Support received by you | |
| _____ Safety Deposit Box Rental receipts | _____ Tuition Certificates for Children and yourself |
| _____ Copy last year's Notice of Assessment | |

_____ **Capital Gains and Losses – January to December**

Details of any Stocks or Bonds, other Investments or Real Estate purchases or sold this past year by you or your spouse.

Date of Purchase: _____

Purchase Price: _____

Date of Sale: _____

Sale Price: _____

_____ **Investment Income - January to December**

- _____ All T5, T3, T4RIF, T4RSP forms received by you
- _____ Interest received by you, or your spouse, as a return on any loans made by you to any firm or person.
- _____ Interest received by you, or your spouse, as a return on money loaned by you on a mortgage.
- _____ Income and Expenses for any rental property. Please list details on the Statement of Rental Properties that has been enclosed for your convenience.
- _____ Details of all Canada Savings Bonds currently owned.
- _____ Details of any loans for Investment purposes including interest paid during the past year.
- _____ Details of any student loans including interest paid during the year.

Are you a part year resident in Canada? () Yes () No

Do you agree to Revenue Canada forwarding your name, address and date of birth to Elections Canada to help keep your information up to date on the National Register of Electors?

() Yes () No

