

T4/T5 INFORMATION RETURN CHECKLIST

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To help you assemble your financial information for the preparation of your T4/T5 Information Return, please keep this checklist handy. The checklist should be completed and returned to us together with the financial information assembled.

Corporation Information

Business Number: _____

Name of Corporation: _____

Corporation Address: _____

City: _____ Province/State _____ Postal Code _____

Country _____

Work Phone: _____ Ext: _____ E-Mail: _____

Recipient #1: Contact Information

Your Name: _____

SIN/BN: _____

Home Phone: _____

Cell Phone: _____

Company E-Mail _____

Address: _____

City: _____

Province/State _____ Postal Code _____

Country _____

E-Mail _____

Total Amount of eligible dividends received from corporation: \$ _____

Total Amount of non-eligible dividends received from corporation: \$ _____

Total Interest from Canadian Sources received (if applicable) \$ _____

Total Capital Gains dividends received (if applicable) \$ _____

Total Salary Recieved from corporation*: \$ _____

* Please Provide Excel Spreadsheets (CVS) showing salary and payroll deductions and payments made to CRA.

Recipient #2: Contact Information

Your Name: _____
SIN/BN: _____
Home Phone: _____
Cell Phone: _____
Company E-Mail _____

Address: _____
City: _____
Province/State _____ Postal Code _____
Country _____
E-Mail _____

Total Amount of eligible dividends received from corporation: \$ _____

Total Amount of non-eligible dividends received from corporation: \$ _____

Total Interest from Canadian Sources received (if applicable) \$ _____

Total Capital Gains dividends received (if applicable) \$ _____

Total Salary Received from corporation*: \$ _____

* Please Provide Excel Spreadsheet (CVS) showing salary and payroll deductions and payments made to CRA.

Recipient #3: Contact Information

Your Name: _____
SIN/BN: _____
Home Phone: _____
Cell Phone: _____
Company E-Mail _____

Address: _____
City: _____
Province/State _____ Postal Code _____
Country _____
E-Mail _____

Total Amount of eligible dividends received from corporation: \$ _____

Total Amount of non-eligible dividends received from corporation: \$ _____

Total Interest from Canadian Sources received (if applicable) \$ _____

Total Capital Gains dividends received (if applicable) \$ _____

Total Salary Received from corporation*: \$ _____

* Please Provide Excel Spreadsheet (CVS) showing salary and payroll deductions and payments made to CRA.

