

Complimentary Checklist for Preparing Your Taxes

Providing us with as much detail as possible will expedite the processing of your tax return! Thanks for your help!

General Items

- ❑ If you are a new client, please include a copy of last year's return.
- ❑ Note changes to personal status including Dates, such as:
 - Marriage,
 - Separation,
 - Births,
 - New address,
 - Telephone number
 - Email address
 - Disabilities,
 - Deaths, etc.
- ❑ Receipts for Public Transit Passes – for job and medical commute purposes
- ❑ T4A (P) Canada Pension Plan Benefits
- ❑ Pension Income—Foreign and Domestic
- ❑ T4 RIF – Registered Income Fund
- ❑ T4 (employment); T4A (commissions and self-employed);
- ❑ T4E (employment insurance)
- ❑ T4OAS (old age security)
- ❑ T5 (investment income); T3 (income from trusts)
- ❑ T5007 (workers' compensation/social assistance payments)
- ❑ T5013 (partnership income)
- ❑ Documents re: purchase or sale of investments/real estate (including details of shares donated to charity)
- ❑ T4RSP (retirement savings plan income)
- ❑ RRSP contribution slips
- ❑ Medical, dental, nursing home and other private medical insurance receipts (**Try to get an annual summarized printout from your pharmacy!**)
 - Mileage for long distance travel to get medical help (over 40 km one way)
 - Meals & lodging while long distance from home due to medical treatment
- ❑ Charitable donations
- ❑ Tuition fees/education amount (T2202A)
- ❑ Interest paid on student loan(s)
- ❑ Professional dues/union dues
- ❑ Details of foreign property holdings (if any) *
- ❑ Details of any foreign income or holdings*
- ❑ Carrying charges/loan interest
- ❑ Professional consultants' fees
- ❑ Spousal support income/payments
- ❑ Separation – copy of agreement and details regarding child(ren) care
- ❑ Details of people you support and their medical status
- ❑ Child care information—receipts needed (if camp, dates must be listed)
- ❑ Property taxes/rent paid and to whom

- ❑ Moving expenses – *for job or medical purposes only*
- ❑ Political contribution receipts
- ❑ If you are claiming disability credits for yourself or a dependent -T2201 Disability tax credit claim form completed by doctor, **if first year or renewal year**
- ❑ Details of any investments that have or may have specific tax consequences
- ❑ Tax installments paid in the year (receipts required)
- ❑ RRSP Homebuyer and education withdrawal information
- ❑ Legal fees regarding adoptions, (any adoption expenses)
- ❑ Employment Expenses (if employer expects you to have cell, internet etc at your own cost)

Rental Property

- ❑ Address and number of units
- ❑ Details of money spent and received including but not limited to:
 - Rent per unit,
 - Property taxes,
 - Mortgage interest,
 - Utilities,
 - Repairs, insurance and renovation costs
- ❑ Co-owners/Partners' names, addresses and SINs

Small Business/Farming/Self-employed/Commission Earners

- ❑ Revenue and expenses for the year
- ❑ Asset additions – purchases of capital over \$500
- ❑ **Do you have an office in your home?** We need the details of what you paid–
 - Property taxes,
 - Mortgage interest,
 - Utilities,
 - Repairs and insurance
- ❑ Do you use your car to earn income? We need the details–
 - Amount spent on gas, repairs,
 - Insurance & licenses
 - Parking & tolls
 - Car washes,
 - Leasing or original cost if traded or acquired in year
 - **The amount of business and personal mileage**
- ❑ Form T2200 from employer (declaration of conditions of employment)
- ❑ If you are a vehicle mechanic apprentice - Details of tool costs in year, tools lost or disposed of
- ❑ Advertising and promotion costs
- ❑ Employed Truckers (TL2) – meals and lodging bases on log sheets
- ❑ Total kilometers driven and/or vehicle driving log

Please use this checklist to organize your paperwork before you come for your appointment. Thank you!