



## PERSONAL INCOME TAX RETURN GENERAL CHECKLIST GUIDE

PLEASE INCLUDE ALL INFORMATION SLIPS RECEIVED, INCLUDING BUT NOT RESTRICTED TO THE FOLLOWING.

**THIS IS A GUIDE – Not all of these slips will apply to every situation.**

**In addition to these slips, include any information you feel may be required in preparing your tax return.**

INCOME	DEDUCTIONS AND TAX CREDITS
<input type="checkbox"/> Employment income (T4)	<input type="checkbox"/> RRSP contributions made in the year plus within 60 days of the new year (official income tax receipts)
<input type="checkbox"/> Tips \$ _____	<input type="checkbox"/> Union, professional or like dues
<input type="checkbox"/> Other employment income (T4A)	<input type="checkbox"/> Childcare expense receipts, including camp and pre-school fees (receipts required)
<input type="checkbox"/> Pension and retirement income (T4A)	<input type="checkbox"/> Moving expenses (if moving at least 40 km closer to a <u>new</u> work or school location)
<input type="checkbox"/> Old Age Security [T4A (OAS)]	<input type="checkbox"/> Deductible alimony paid: \$ _____ Copy of agreement Cancelled cheques for alimony and child support paid
<input type="checkbox"/> Canada Pension [T4A(P)]	<input type="checkbox"/> Employment expenses: A declaration of condition of employment (T2200) MUST be signed by your employer, and submitted if you are claiming employment expenses
<input type="checkbox"/> Registered retirement income fund (T4RIF)	<input type="checkbox"/> Statement of interest paid on monies borrowed <u>for investment purposes</u>
<input type="checkbox"/> Employment Insurance Benefits (T4E)	<input type="checkbox"/> Investment counsel fees (outside of RRSPs)
<input type="checkbox"/> Interest or dividend income (T5/T600)	<input type="checkbox"/> Student loan interest (official receipt only)
<input type="checkbox"/> Trust, investment and mutual fund income (T3) (You may not receive these until April)	<input type="checkbox"/> Tuition receipts for yourself (official receipt only)
<input type="checkbox"/> Interest income earned but not yet received \$ _____	<input type="checkbox"/> Tuition transfers from child: Child to sign T2202A authorizing transfer. Please include child's: Net income (Line 150) _____
<input type="checkbox"/> Limited Partnership (T5013)	<input type="checkbox"/> Non-refundable tax credits _____
<input type="checkbox"/> Do you own rental property? We need all the details with regard to income and expenses. (See our website for form.)	<input type="checkbox"/> Medical, prescription, dental and other medical receipts (excluding BC Medical payments) including payments made to a private plan. (See forms on website.)
<input type="checkbox"/> Did you buy, sell or change the use of a <b>principal residence</b> , rental, investment or recreational property? If so, please provide details	<input type="checkbox"/> Home accessibility expenses of an eligible dwelling (maximum \$10,000, for self or spouse, must be 65 or older or have a disability tax credit)
<input type="checkbox"/> Did you sell shares or mutual funds (outside of RRSP's)? If so, please provide a summary of capital gains and losses – see our website for form to use or request details from your investment advisor	<input type="checkbox"/> Charitable donations up to and including December 31st (Receipts required). If first time donor, please advise
<input type="checkbox"/> Child support/alimony received: Amount \$ _____ Date of written agreement _____	<input type="checkbox"/> Political contribution receipts
<input type="checkbox"/> RRSP's cashed during the year (T4RSP)	<input type="checkbox"/> Child Fitness Tax Credit receipts (maximum \$500 per eligible child). This is the last year for this tax credit
<input type="checkbox"/> Home Buyers Plan or Life Long Learning Plan RSP withdrawals	<input type="checkbox"/> Child Arts Tax Credit receipts (maximum \$250 per eligible child) This is the last year for this tax credit
<input type="checkbox"/> Are you self-employed? We require the details of the business or partnership income, expenses and internet sales details incl. website and % income generated	<input type="checkbox"/> Eligible educator school supply tax credit (maximum \$1,000)
<input type="checkbox"/> W.C.B. benefits (T5007)	<input type="checkbox"/> BC Education Coaching Tax Credit (let us know if this applies)
<input type="checkbox"/> Universal Child Care Benefits received (RC62)	

### EXAMPLES OF OTHER INFORMATION WHICH MAY BE APPLICABLE TO YOUR TAX RETURN

<input type="checkbox"/> Personal tax installment payments made for the year	<input type="checkbox"/> If you provided in-home care for a parent or grandparent (including in-laws) 65 years of age or over, or an infirm dependent relative, a tax credit may be available. Also, the caregiver may claim related training costs as a medical expense credit.
<input type="checkbox"/> Copy of last years tax return (if new to our firm this year)	<input type="checkbox"/> If you or a dependent is disabled, provide Form T2201 Disability Tax Credit Certificate, to claim a tax credit
<input type="checkbox"/> Previous year's income tax assessment notice received from Canada Revenue Agency (CRA)	
<input type="checkbox"/> Are you a citizen or resident of any other country	
<input type="checkbox"/> Did you sell a principal residence during the year?	
<input type="checkbox"/> Pension Adjustment Reversal (T10 Slip)	