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

___ Employment income (T4)

___ Tips $______________

___ Other employment income (T4A)

___ Pension and retirement income (T4A)

___ Old Age Security [T4A (OAS)]

___ Canada Pension [T4A(P)]

___ Registered retirement income fund (T4RIF)

___ Employment Insurance Benefits (T4E)

___ Interest or dividend income (T5/T600)

___ Trust, investment and mutual fund income (T3)
(You may not receive these until April)

___ Interest income earned but not yet received $____________

___ Limited Partnership (T5013)

___ Do you own rental property? We need all the details with regard to income and expenses. See form on website.

___ Did you buy, sell or change the use of a rental, investment or recreational property? If so, please provide the date of acquisition and cost (purchaser's statement of adjustments, date and proceeds of disposition (copy of the seller's statement of adjustments),

___ 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

___ Child support//spousal support received:
Amount $___________
Provide a copy of the written agreement.

___ RRSP's cashed during the year (T4RSP)

___ Home Buyers Plan or Life Long Learning Plan RSP withdrawals

___ Are you self-employed? We require the details of the business or partnership income, expenses and internet sales details incl. website and % income generated

___ W.C.B. benefits (T5007)

___ Universal Child Care Benefits received (RC62)

DEDUCTIONS AND TAX CREDITS

___ RRSP contributions made in the year plus within 60 days of the new year (official income tax receipts)

___ Union, professional or like dues

___ Childcare expense receipts, including camp and pre-school fees (receipts required)

___ Moving expenses (if moving at least 40 km closer to a new work or school location)

___ Deductible spousal support paid: $__________
Copy of agreement
Cancelled cheques for alimony and child support paid

___ Employment expenses: A declaration of condition of employment (T2200) MUST be signed by your employer, and submitted if you are claiming employment expenses

___ Statement of interest paid on monies borrowed for investment purposes

___ Investment counsel fees (outside of RRSPs or TFSA's)

___ Student loan interest (official receipt only)

___ Tuition receipts for yourself (official receipt only)

___ Tuition transfers from child: Child to sign T2202A authorizing transfer. Please include child's:
Net income (Line 150)_________________
Non-refundable tax credits ______________

___ Medical, prescription, dental and other medical receipts (excluding BC Medical payments) including payments made to a private plan. (See forms on website.)

___ 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)

___ Charitable donations up to and including December 31st (Receipts required).

___ Political contribution receipts

OTHER

___ Did you sell or change the use of a **principal residence**? If so, please provide the year of acquisition, proceeds of disposition (copy of the seller's statement of adjustments), whether the property exceeds ½ hectare in size and if you are eligible to claim the principal residence exemption for all years owned (we can provide further guidance if you are unsure).

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

___ Personal tax installment payments made for the year
___ Copy of last years tax return (**if new to our firm this year**)
___ Previous year's income tax assessment notice received from Canada Revenue Agency (CRA)
___ Are you a citizen or resident of any other countryl
___ Pension Adjustment Reversal (T10 Slip)

___ 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.

___ If you or a dependent is disabled, provide Form T2201 Disability Tax Credit Certificate, to claim a tax credit or advise if you already have it.

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