



## 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.**

<b>INCOME</b>	<b>DEDUCTIONS AND TAX CREDITS</b>
<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 spousal support paid: \$ _____ Copy of agreement
<input type="checkbox"/> Canada Pension [T4A(P)]	<input type="checkbox"/> Cancelled cheques for alimony and child support paid
<input type="checkbox"/> Registered retirement income fund (T4RIF)	<input type="checkbox"/> Employment expenses: A declaration of condition of employment (T2200) <b>MUST</b> be signed by your employer, and submitted if you are claiming employment expenses
<input type="checkbox"/> Employment Insurance Benefits (T4E)	<input type="checkbox"/> If you worked from home due to COVID-19 you may be eligible for a temporary flat rate deduction of \$2 per day to a maximum of \$400 per year. You must have worked more than 50% of the time from home for a period of at least four consecutive weeks.
<input type="checkbox"/> CERB (T4A)	<input type="checkbox"/> Statement of interest paid on monies borrowed <u>for investment purposes</u>
<input type="checkbox"/> Interest or dividend income (T5/T600)	<input type="checkbox"/> Investment counsel fees (outside of RRSPs or TFSA's)
<input type="checkbox"/> Trust, investment and mutual fund income (T3) (You may not receive these until April)	<input type="checkbox"/> Student loan interest (official receipt only)
<input type="checkbox"/> Interest income earned but not yet received \$ _____	<input type="checkbox"/> Tuition receipts for yourself (official receipt only)
<input type="checkbox"/> Limited Partnership (T5013)	<input type="checkbox"/> Tuition transfers from child: Child to sign T2202A authorizing transfer. Please include child's: Net income (Line 150) _____
<input type="checkbox"/> Do you own rental property? We need all the details with regard to income and expenses. See form on website.	<input type="checkbox"/> Non-refundable tax credits _____
<input type="checkbox"/> 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),	<input type="checkbox"/> Medical, prescription, dental and other medical receipts including payments made to a private plan.
<input type="checkbox"/> Did you sell shares or mutual funds (outside of RRSP's)? If so, please request details from your investment advisor	<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"/> Child support//spousal support received: Amount \$ _____ Provide a copy of the written agreement.	<input type="checkbox"/> Charitable donations up to and including December 31st (Receipts required).
<input type="checkbox"/> RRSP's cashed during the year (T4RSP)	<input type="checkbox"/> Political contribution receipts
<input type="checkbox"/> Home Buyers Plan or Life Long Learning Plan RSP withdrawals	<b><u>OTHER</u></b>
<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"/> Did you sell or change the use of a <b>principal residence</b> ? 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).
<input type="checkbox"/> W.C.B. benefits (T5007)	<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.

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

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| <input type="checkbox"/> Personal tax instalment 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. |
| <input type="checkbox"/> Copy of last year's tax return ( <b>if new to our firm this year</b> ) | <input type="checkbox"/> If you or a dependent is disabled, provide Form T2201 Disability Tax Credit (DTC) Certificate, to claim the DTC or advise if the DTC is already approved.             |
| <input type="checkbox"/> Previous year's Notice of Assessment                                   |  |
| <input type="checkbox"/> Are you a citizen or resident of any other country                     |  |
| <input type="checkbox"/> Pension Adjustment Reversal (T10 Slip)                                 |  |