



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 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) MUST 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 in 2020 and up to \$500 in 2021 and 2022. 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 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"/> 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	
<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"/> W.C.B. benefits (T5007)	

OTHER

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.
<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
<input type="checkbox"/> Previous year's income tax assessment notice received from Canada Revenue Agency (CRA)	<input type="checkbox"/> Disability Tax Credit Certificate, to claim a tax credit or advise if you already have it.
<input type="checkbox"/> Are you a citizen or resident of any other country	
<input type="checkbox"/> Pension Adjustment Reversal (T10 Slip)	