



PERSONAL INCOME TAX RETURN CHECKLIST



General Items

- Notice of Assessment
- Notices of Reassessments, if applicable
- Details of personal changes such as birth, marriage separation, new address, telephone number, disability, etc.
- Did you receive the Universal Child Care Benefits? If yes, please provide us with the RC62 Slip.
- T4; T4A; T4E or T4F slips if applicable
- T4A(P) - CPP Benefits; T4A(OAS) Old Age Security Slips if applicable
- T3 (income from trusts); T5 (investment income) slips
- T4(RSP) Registered Savings Plan income; T4(RIF) Registered Income Fund income
- Details of foreign pensions received during the year
- US Social security benefits statement
- T5007 slip (workers compensation/social assistance) payments
- T5013 (partnership income)

- RRSP contribution slips
- Child care receipts
- Receipts for children's participation in programs related to fitness and arts activities
- Charitable donation receipts
- Medical, dental, nursing home or other private medical or travel insurance receipts (including details for medical travel)
- Statement of student loan interest paid
- T2202A Tuition fees (The form can often be downloaded from the institution's website)
- Details of capital gains and losses during the year
- Details of foreign property holdings and income
- Instalments statement or details of amounts paid
- Moving expenses
- Interest and carrying charges on investment income
- Taxable or deductible support payments
- Safety deposit box rental fees
- Cancelled cheque if interested in direct deposit

Self-employment Items

- Revenue and expenses for the year
- Assets additions and disposals, including supporting documents
- Details of home office expenses, such as:
 - Rent, mortgage interest, property taxes
 - utilities, repairs and maintenance,
 - insurance
- Details of vehicle expenses, such as:
 - gas, repairs, insurance, parking, car-washes, leasing, purchase or disposal documents
 - Mileage log or number of kilometres driven for business and total driven in the year

Rental Property Items

- Address and number of units
- Rents received per unit
- Mortgage interest, property taxes
- Utilities - hydro, oil, water and gas
- Repairs and maintenance - detailing capital improvements separately
- Insurance
- Partner's names, addresses and SINs
- Purchase and/or sale documents

*We would like to take this opportunity to thank you for your continued business and referrals and as always, look forward to your next visit to the office.
Please do not hesitate to
contact us if you have any questions regarding these or any tax matters.*