

## PERSONAL TAX CHECKLIST - GENERAL

Use this checklist to help make sure you have all the documents you need for us to complete your income tax return. If you have income from self-employment, rental income or employment expenses, please refer to separate checklists

### 1. TAX SLIPS

- Employment Income - T4
- Employment insurance benefits - T4E
- Interest, dividends and other investment income - T3, T5, T5008, T5013
- Income from an RRSP / RRIF - T4RSP, T4RIF
- Tuition - T2202A: most schools no longer mail these - the student will need to download them online  
If tuition is to be transferred to a parent, please have student sign the form where indicated
- Old Age Security and CPP benefits - T4A-OAS, T4AP
- Other Pensions and annuities - T4A
- Social assistance / Workers' compensation benefits - T5007

### 2. RECEIPTS & OTHER DOCUMENTS

- RRSP contribution receipts** - you will receive separate receipts for any contributions made in January and February. Please ensure these are included - they **MUST** be declared in the tax return of the prior year
- Professional or union dues** - provide official receipts, if amounts not already indicated on your T4
- Medical expenses** - must be actually PAID during the year. If you have many prescriptions from the same pharmacy or dental invoices etc. please ask them for an annual statement which will help us with processing, and also ensure you haven't missed any receipts.
- Charitable donations** - **MUST** have official donation receipt with Canadian Registered Charity Number indicated. With very limited exceptions, foreign charitable donations are not deductible, other than if you have foreign income from the country in question.
- Political contribution receipts** - must be official receipt from Federal or Provincial political party
- Child care expenses** - receipts must indicate the child's name and period of care for EACH child  
If you paid amounts to an individual for child care, you must provide their social insurance number
- Moving expenses** - you must have moved at least 40 kilometres closer to your new place of work or business. Please contact us if you are unsure of eligibility

- Interest paid on student loans** - must be for loans issued under the Canada Student Loans Act
- Dispositions of stocks or mutual funds** - if you have sold stocks or mutual funds during the year, please ensure your documentation includes the cost base for these investments. If it is not indicated, please ask your investment advisor to provide it.
- Investment statements** - If you receive a year-end package from your investment advisor, please bring the entire package as there is important information included. We do not generally need either monthly or quarterly statements. We also do not need any statements relating to RRSP or TFSA investment accounts. The only information required for RRSP's are official slips such as contribution receipts or T4RSP's
- Trillium Benefits / GST-HST Credit / Canada Child Benefit** - ALL OF THESE AMOUNTS ARE NON-TAXABLE. WE DO NOT NEED ANY DOCUMENTATION REGARDING THEM
- Support payments (received or made)** - Please provide details. Payments must be periodic in nature and pursuant to court order or written agreement. If not previously provided, please bring copy of court order or written agreement.
- Tax assessment from prior years** - if you are a returning client, we no longer need this since we have access to it online. If you are a new client, please bring both your prior year's assessment and tax return.
- Installment payments** - If you made installment payments in the past year, please bring receipts. For returning clients, we have online access to this information as well, but we like to ensure that you were properly credited for all payments made during the year
- Rent or Property Taxes** - Please provide the amount of rent and/or property taxes that you paid during the year including name of landlord or municipality it was paid to. If you lived at multiple residences during the year, please provide information for each, along with the number of months at each residence. Amounts must be actually paid during the year, and do not include any interest or penalties. For renters, only regular rent payments are to be included - if utilities are paid separately these do not count. Deposits paid for final months rent or damages are also not included. You do not need to provide us with actual receipts for any of these amounts, however the Canada Revenue Agency (CRA) frequently requests this documentation after the fact. If you do provide us with receipts, we will keep a scanned copy and send it to CRA on request.