

Name: _____

Tax Year: _____

Client Label

- NEW ADDRESS**
- First Time Home Buyer**
- Marital Status Change**
Common Law/Marriage/Divorce
- Death Certificate**

Dependent Information

- | | |
|----------------|----------------|
| Name: | Name: |
| SIN: | SIN: |
| Date of Birth: | Date of Birth: |

PERSONAL INCOME TAX CHECKLIST

Use this Handy Checklist to ensure you have all the documents your tax professional needs to help maximize your refund

- Did you own foreign property at any time with a total cost in excess of \$100,000
- Did you sell property which you are claiming the principal residence exemption?
Year of purchase _____ Selling Price \$ _____

Slips

- All T4 Slips (employment income)
- Employment Insurance Benefits (T4E)
- Interest, Dividends, Mutual Funds (T3,T5)
- Universal Child Care Benefits (RC62)
- Old Age Security and CPP Benefits (T4A-OAS,T4AP)
- Other Pensions and Annuities (T4A)
- Social Assistance Payments (T5007)
- Workers' Compensation Benefits (T5007)
- All other information slips
- T4 RSP/T4 RIF

*The accuracy of your return will depend on the completeness and correctness of the information you provided. Your co-operation to have all documents to us before **April 23rd** will ensure we meet the April 30th filing **deadline***

Receipts

- RRSP Contribution Receipts
- Support for Child/Spouse or common law partner paid or received
- Professional Fees or Unions Dues
- Tool Expenses (Tradespersons)
- Tuition/Educational Receipts
- Transit Pass Receipts
- Charitable Donations
- Political Contributions
- Child Care Expenses
- Moving Expense
- Interest Paid on Student Loans
- Carrying Charges and Interest Expense
- Exams for Professional Certification
- Teacher and Early Childhood School Supplies
- Foreign Tax Paid on foreign income (Tax treaty)
- Home Accessibility Tax Credit

Other Documentation

- Notice of Assessment and Prior year Taxes (new)
- Canada Revenue Agency Correspondence
- Sale or deemed sale of stocks, bonds, real estate Mutual Fund/Brokerage capital gain/loss statement
- Mortgage Statement/Property Taxes
- Rental Income and Expense Records
- Automobile/Travel Log and Expenses
- Declaration of Conditions of Employment (T2200)
- Employment expenses
- Office in home expenses
- Volunteer Firefighters Certification
- Adoption Expenses
- T2201 Disability Tax Credit (New or On File)
- Medical Expenses

** Include premiums paid for medical insurance coverage inside and outside of Canada plus dental/prescriptions, optometrist, massage therapy and chiropractic not covered by insurance. If you have travelled more than 40 km for treatment not otherwise available nearer to home include mileage, meal and accommodations, Attendant Care/Nursing Home costs
Visit www.cra-arc.gc.ca type "Medical Expense" in the search

Call or email any questions



50 Sportsworld Crossing Rd. Suite 280 Kitchener, ON N2P 0A4
519-650-8111 x229 or cell 519-589-1054
Email: lisa.lishman@f55f.com