

INCOME TAX CHECKLIST

Tips to Minimize Professional Fees:

- Make an appointment with Dave if you have a complex situation, or if you have any questions
- Include a summary of non-registered investment income, including capital gains/losses realized (if not held with Investia)
- Organize your T-slips, medical and donation receipts by category (do not separate copies)
- **Medical:** if you have a lot of prescription receipts, get a summary printout from the pharmacy
- Include fully-completed bookkeeping Income and Expense summary for your unincorporated business (do not include receipts)
- Bring everything in **ONE PACKAGE** as soon as you have all your personal tax info, preferably by mid-March.

Personal Information to provide for each person for which a tax return is to be prepared:

Person # 1:

Name: _____ Birthdate: _____ SIN #: _____

Full home mailing address: _____

Email address: _____

Phone numbers: home: _____ work: _____ cell: _____

Marital status: _____

Person # 2:

Name: _____ Birthdate: _____ SIN #: _____

Full home mailing address: _____

Email address: _____

Phone numbers: home: _____ work: _____ cell: _____

Marital status: _____

Children: Name: _____ DOB _____

Name: _____ DOB _____

Name: _____ DOB _____

Use a separate page if more than 2 tax returns are to be done for your family.

Documentation to Provide:

Not all of these will apply. Include the items relevant to your situation.

Slips:

- All T4 slips (Employment Income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual fund (T3, T5)
- Tuition / education receipts (T2202A)
- Universal Child Care Benefit (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

Receipts:

- RRSP contribution receipts
- Spousal support / alimony
- Professional or union dues
- Tool expenses (Tradespersons)
- Medical expenses
- Transit passes and receipts
- Charitable donation receipts
- Political contributions
- Child Care expenses
- Children's arts and sports programs
- Interest paid on student loans
- Exams for professional certification

Other Documentation:

- Notice of Assessment / Reassessment
- Canada Revenue Agency correspondence
- Capital Gain/Loss from sale of stocks, bonds or real estate - amounts and statements
- Rental income and expense summary
- Carrying charges and interest expense (e.g. B2B Trust)
- Home office expenses
- Business, farm or fishing income/expenses
- Automobile / Travel logbook and expenses
- Disability Tax Credit certificate
- Declaration of Conditions of Employment (T2200)
- Summary of tax instalments paid
- Home Buyer's Plan withdrawals and repayments during the calendar year
- Safety deposit box expenses
- Amount paid for property taxes
- If renting: total rent paid (and who it was paid to)
- Amount paid for tax preparation last year
- Each dependant's net income (unless Dave doing their tax return)
- Copy of prior year's income tax return(s) if Dave did not compile.