

Check List

Income:

- T4 slips (Employment, RRSP, Withdrawals, RRIF, Pension, Employment Insurance, OAS, CPP etc.)
- T5 slips (Investments and bank interest)
- T3 slips (investments and mutual funds, T5007 slips (WCB and other non-taxable government payments)
- All other income (eg: foreign income, alimony, child support)

Deductible Expenses and Tax Credits:

- RRSP Contributions
- Professional or Union Dues
- Child care expenses (eg: pre-school, baby-sitting, summer camps)
- Moving expenses (only if you move 40Kms closer to your new place of work)
- Alimony and/or child support payments (Please provide a copy of the separation agreement)
- Tax shelter slips (limited partnerships T5013)
- Medical Expenses, charitable donations and political contributions
- Loan interest and other expenses related to investments (i.e.: accounting fees, etc.)
- Other tax credits (eg: disability claims, education credit transferred from a child, etc.)

Employee and Commission Salesperson Expenses

- Meals and entertainment
- Automobile expenses (total kms, work kms, gas, repair, parking, insurance, lease payments, purchase price of car)
- Home offices expenses (rent, utilities, repairs, office supplies, phone, property taxes, insurance and % used for office)
- Other supplies not provided by your employer
- T2200 tax form signed by your employer (this form confirms that your employer required you to pay your own expenses)

Background information on you:

- Copy of your last year's tax return assessment from Canada Revenue Agency if we did not prepare it.
- Your address, phone #, SIN #, birth date, marital status, dependant(s) information, etc.
- Other items that affect your taxes (Homeowners RRSP withdrawal, marriage, divorce, bankruptcy, leaving or returning to Canada)
- Do you need to file prior year(s) tax returns?
- Do you hold investments either in a foreign country, foreign trust, or a foreign currency denominated account with your financial advisor? (T-1135 Forms)

Rental Income:

- Summary of rent received and expenses paid for each property
- Statement from your financial institution showing interest expense for the mortgage
- % allocation between personal and rental if you rent out your own home
- Copies of legal paperwork (statement of adjustments) for the purchase or sale of any property

Capital Gains & Losses:

- Sales price and sales date of your investments and the expenses to sell the investments
- Purchase price and date purchased of your investments
- Summary from your investment advisor of transactions during the year (Note: Capital gains and losses from sales of investments are NOT included on T3/T5 slips)
- Loan interest expense for investments
- Copy of all monthly brokerage statements