

Income Tax Checklist

Help us help you maximize your refund by getting you every credit & deduction you're entitled to. Here is a list of slips and documents your tax advisor will need to help minimize your taxes.

Government Forms & Slips

- Employment Slips (T4)
- Employment insurance benefits (T4E)
- Interest, dividends, investments (T3, T5, T5008)
- RRSP/RRIF Withdrawals (T4RSP, T4RIF)
- Tuition (T2202A)
- Old Age Security and CPP (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 Paid/Received
- Childcare and day camps
- Professional or union dues
- Tool expenses (Tradespersons)
- Medical expenses not reimbursed (compute totals)
- Charitable & Political donations
- Adoption expenses
- Moving expenses (moved 40+ kms for work/school)
- Interest paid on student loans
- Carrying charges and interest expenses
- Home office expenses
- Property tax/Rent receipts or totals
- Legal Fees Paid for Severance or Support disputes

Other Documentation

- Last Year's Notice of Assessment/Reassessment
- Any CRA letters received
- Direct Deposit details (if CRA)
- Foreign income received or taxes paid
- Tax Instalments paid during the year
- Sale of stocks, bonds, or real estate
- Sale of home:
 - Address
 - Year Purchased
 - Sale Price
- Rental income and expense
 - Complete our worksheet
- Business income and expense
 - Complete our worksheet
- Auto/Travel logbook and expense
- Disability Tax Credit
- Declaration of Conditions of Employment (T2200) for employment expenses
- Details of address change
- Home Buyer's Plan or First Time Buyer
- Child/Dependent details
- Caregiver for dependent parent/child
- Senior Accessibility Renovations (65+)
- Details of change in name or marital status