

Income Tax Preparation List

General Items

- Prior year notice of assessment
- Note changes to personal status, such as marriage, separation, births, new address, telephone number, disabilities, deaths, etc.
- T4 (employment); T4A (commissions and self-employed); T4E (employment insurance)
- T4A (P) Canada Pension Plan Benefits
- T4OAS (old age security)
- T5 (investment income); T3 (income from trusts)
- T4RSP (retirement savings plan income)
- T4 RIF (registered retirement income fund)
- Amounts paid by installments
- RC 62(universal child care benefit)
- T5013 (partnership income)
- T5007 (workers' compensation/social assistance payments)
- RRSP contribution slips
- Tax installments paid in the year
- Documents re: purchase or sale of investments & real estate
- Medical, dental, nursing home and other private medical insurance receipts
- Charitable donations
- Tuition fees/ education amount (T2202A)
- Interest paid on student loans
- Safety deposit box fees
- Carrying charges/loan interest
- Property taxes/rent paid and to whom
- Child care information – receipts needed (if camp, dates must be listed)
- Receipts for children's participation in programs related to physical activity and arts programs
- Political contribution receipts
- Receipts for public transit passes
- Details of foreign property holdings and foreign income

Rental Property

- Address and number of units
- Details of money spent and received including but not limited to rent per unit, property taxes, mortgage interest, utilities, repairs, insurance and renovation costs

Business Income/Farming/Self-Employed Income/ Commission Expenses

- Revenue and expenses for the year
- Asset additions
- Do you have an office in your home? We need the details of what you paid – e.g., property taxes, mortgage interest, utilities, repairs and insurance
- Do you use your car to earn income? We need the details – amount spent on gas, repairs, insurance, parking, car washes, leasing or original cost, the amount of business and personal mileage
- Form T2200 from employer (declaration of conditions of employment)

Please contact us if you need help or require explanations concerning any checklist items.

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