

Eliminate confusion at tax time! Be sure everything is organized and ready for your accountant with this checklist.

NOTE: YOU SHOULD RECEIVE ALL YOUR APPLICABLE TAX DOCUMENTATION BY THE END OF MARCH.

GENERAL ITEMS

- Your current contact info
- Copy of any foreign tax return filed (U.S. citizens must file U.S. returns)
- Notice of Assessment
- Other years' reassessments received in the current year
- Your personal status such as dates of marriage, separation, divorce, or widowed, births & deaths
- Names, birth date, and SIN of spouse & dependents
- Installment payments made, if any
- Include address of all real estate holdings outside Canada
Details of foreign property holdings (if any*) (T1135**)
- Signed T1013 consent form
- Copy of separation agreement and Support & Settlement details resulting from matrimonial changes, if any
- Direct deposit information, if desired or bank changed
- HBP/LLP participation/repayments
- If you moved during the year, selling price of your principal residence and year of acquisition.

INCOME DETAILS

- Universal child care benefit (RC62)
- Employment income (T4)
- Tips/gratuities received during the year
- Pension income (T4A, T4A(P), T4RIF, T4RSP)
- U.S. Social security & any other foreign pensions
- Old age security (T4OAS)

- Investment income (T5)
- Income from trusts such as mutual fund investments (T3)
- Income from employment insurance (T4E)
- Income from partnerships (T5013)
- Workers compensation/social assistance payments (T5007)
- Details of the sale of securities such as stocks & bonds (e.g., realized gain/loss report from your broker), possible T5008 slips
- Details of real estate sales & purchases
- Income from foreign investments
- Spousal support payments received
- T4As for any miscellaneous income received during the year
- T4PS (Profit sharing)

DEDUCTIONS – EMPLOYEES

- Trades people & apprentice tool purchases, if eligible
- Declaration of conditions of employment form (need SIGNED T2200 by employer)
- Expenses not reimbursed by your employer
- Office rent if required as condition of employment
- Home office expenses
- If you are a commissioned salesperson, details supporting advertising expenses, promotion, meals & entertainment
- Volunteer firefighters' certification (i.e. verify hours, on call etc.)

DEDUCTIONS - MOTOR VEHICLES, IF ELIGIBLE *

- Total kilometres driven & kilometres driven just for work
- Make and model of vehicle
Details of total expenses

- New vehicle, purchase invoice/lease agreement

DEDUCTIONS – GENERAL

- RRSP contributions
- Medical, dental, prescription drugs, nursing home expenses
- Payments to a private health insurance plan
- Charitable donations
- Tuition fees/education amount (T2202A for Canadian & TL11 for foreign universities) for yourself or transferred from a dependent, signed by student
- Interest paid on student loans
- Professional dues & insurance, union dues
- Public Transit Passes
- Children's participation in programs related to physical activity and arts
- Interest on loans assumed to purchase investments

- Professional consultant fees
- Details of people you support & their medical status

- Child care receipts (if for camp, list dates as attended)

- Non-reimbursed moving expenses if you moved 40 km or closer to a new work space location

- Property taxes or residential rent paid & to whom and address

- Home renovation costs for those 65 or older or eligible for the disability tax credit

- Political contributions receipts

- Disability tax credit claim form completed by authorized health practitioner (T2201)

- Spousal support payments paid

- Adoption expenses

- Completed form T1223 (clergy residence deduction)

- Summary of receipts for Eligible Educator school supply tax credit

UNINCORPORATED BUSINESSES

- Software backup of bookkeeping records, if computerized (include password)
- Manual bookkeeping records
- Total sales revenue or receipts for the year, if books not kept
- Capital assets acquired (e.g., computers & peripherals, furniture & equipment)
- Home office expenses
- Partners' names, addresses, SINs & percent interest
- Web address and sales from website
- GST/HST number. Do you need assistance in filing your HST return?
- Are there income-splitting opportunities (i.e. spouse, children)?

RENTAL PROPERTIES

- Address & number of units
- Rental income by unit
- Purchase agreement/Sales agreement of rental property(ies) including legal statement of adjustments and trust ledger
- Rental expenses by unit & by category of expense
- Partners' names, address, SINs & per cent interest
- Details of any capital additions over \$500, including furnishings & appliances

* May necessitate the filing of a U.S. or foreign tax return.

** The T1135 has changed, more details are required.