

TAX CHECKLIST

TAX YEAR: _____

Name:
Name:

Contact #
Contact #

- Direct Deposit (provide VOID cheque)
- Address Change in Tax Year
- Marital Change in Tax Year

Dependents (Name, DOB, Relationship & SIN)

Slips

- All T4 slips (Employment Income) include T4RSP, T4RIF
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Tuition/education receipts (T2202A)
- Universal Child Care Benefits (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 slip
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons)
- Medical expenses
- Transit pass receipts
- Charitable donations
- Political contributions
- Child care expenses, attendant care expenses
- Adoption expenses
- Children's art and sports programs
- Moving expenses

Receipts continued

- Interest paid on student loans
- Carrying charges and interest expenses
- Office - in-home expenses
- Exams for professional certification
- Rent receipts, property tax receipt

Other documentation

- Notice of Assessment/Reassessment**
- Canada Revenue Agency correspondence**
- Sale or deemed sale of stocks, bonds or real estate
- Northern resident's deductions
- Rental income and expense records
- Business, farm or fishing income/expenses
- Automobile/Travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification
- Tax installment summary or payments made
- Investment Statements on Non-Registered Accounts (current year)
- _____
- _____
- _____
- _____

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