



## INDIVIDUAL - TAX CHECKLIST

### Bringing Key Records to Your CPA/CGA

Name: \_\_\_\_\_

#### INCOME

- Employment income (All T4 Slips)
- Investment income (T5)
- Pension income (T4A, T4A(P), T4RIF, T4RSP)
- Employment insurance (T4E)
- Trusts income-mutual fund investments (T3)
- Old age security/ CPP benefits (T4OAS)
- Income from partnerships (T5013)
- Social assistance payments (T5007)
- Workers compensation
- Universal child care benefit (RC62)
- RRSP Withdrawals
- Rental Income
- Business, Farm or Fishing Income
- Spousal support payments received
- Income from foreign investments
- Details of real estate sales
- Sale of securities such as stocks and bonds
- (eg. trading summary from your broker)
- All other income

#### DEDUCTIONS – GENERAL

- RRSP contributions
- Medical expenses
- Private health plan payments
- Child care expenses
- Children's fitness/arts program
- Charitable donations
- Political contributions receipts
- Tuition/education amount (T2202A)
- Interest paid on student loans
- Child/Spousal support payments
- Public transit passes
- Moving expenses
- Interest charges/Safety deposit
- Disability credit (T2201)
- Property taxes/rent paid and to whom
- Professional dues, union dues
- Adoption expenses
- Certain Legal fees
- Tool expenses (tradesperson)

#### DEDUCTIONS – EMPLOYEES

- Conditions of employment form (T2200)
- Home office expenses
  - Business portion (Area)
  - Rent/Mort interest paid
  - Utilities
  - Insurance
  - Property taxes
- Commission sales-person
  - Advertising/Promotion
  - Meals & Entertainment
- Motor vehicle expenses
  - Total KM/KM for work
  - Lease payments
  - Loan interest
  - Insurance
  - Repairs & Maint.
  - Gas
  - License & Reg.
  - New vehicle purchase invoice

#### UNINCORPORATED BUSINESSES

- Total sales for the year
- Total expenses by category
- Capital assets acquired
- Home office/Vehicle expenses
- RENTAL PROPERTIES**
  - Address and number of units
  - Rental income by unit
  - Rental expenses by unit/category
  - Motor vehicle expenses
  - Partners' names, addresses and SINS
  - Legal fees
- OTHER ITEMS**
  - Notice of Assessment (Prior Year)
  - Tax returns (Prior Year)
  - Other years' reassessments
  - Contact/personal details if changed
  - Details of foreign property
  - Instalment payments
  - First time home buyers plan