

## Tax Return Checklist

This list is to be used as a guide when preparing information for the completion of your present and future tax returns.

### GOVERNMENT SLIPS / DOCUMENTATION

- Notice of Assessment or Re-Assessment
- Installment Remittance Form
- T4 Slip(s) Number Included: \_\_\_\_\_
- T4A Slip(s) Number Included: \_\_\_\_\_
- T4E Slip(s) Number Included: \_\_\_\_\_
- T4A(P) Slip
- T4OAS Slip
- T4RIF Slip(s) Number Included: \_\_\_\_\_
- T5 Slip(s) Number Included: \_\_\_\_\_
- T3 Slip(s) (please see page 2) Number Included: \_\_\_\_\_
- T5007 Slip(s) Number Included: \_\_\_\_\_
- T5013 Slip(s) Number Included: \_\_\_\_\_
- T4RSP Slip(s) Number Included: \_\_\_\_\_
- RRSP Contribution Receipts Number Included: \_\_\_\_\_
- T2202 / T2202A Tuition Slip Number Included: \_\_\_\_\_

### RECEIPTS FOR GENERAL EXPENSES

- Interest on Student Loans
- Professional or Union Dues
- Property Taxes and/or Rent Paid
- Safety Deposit Box Fees or Other Carrying Charges / Loan Interest
- Spousal or Child Support Payments / Income
- Eligible Child Care Expenses Number Included: \_\_\_\_\_
- Charitable or Political Donations Number Included: \_\_\_\_\_
- OR... See Attached Itemized List*
- Medical Expenses Number Included: \_\_\_\_\_
- OR... See Attached Itemized List*
- Information Regarding Home Buyer's Plan or Life Long Learner's Plan  
Withdrawal or Payments (must include if you are a member)

## INVESTMENT INCOME / SALE OF SHARES

*If you sold any shares this tax year, please be sure to provide your tax preparer with a list that includes...*

- Date of sale of Shares
- Adjusted-Cost-Base (Original Cost of Shares)
- Selling Price of Shares
- Number of Shares Sold
- Type of Shares Sold, Including Company Name

## INCOME FROM A RENTAL PROPERTY

- Address of your Rental Property and Number of Units
- Rent received per unit

*Please Include Receipts or Amounts of any:*

- Property Taxes Paid
- Utilities Paid
- Repairs and Maintenance Paid
- Renovation Costs
- UCC or Capital Cost Allowance
- Insurance Paid

## BUSINESS INCOME / FARMING / SELF-EMPLOYMENT INCOME / COMMISSION EXPENSES

- List of Revenue and Expenses for the tax year (templates available on request)
- Asset Additions
- Business use of home (include portion of home that is used for business i.e.: office taking up entire basement = 1/3 of 3-story home)
- Business use of auto (include log book specifying personal km's vs. business km's driven)
- Form T2200 signed and filled out in full by employer (Declaration of Conditions of Employment)
- Auto Operating Costs
- Meals and Lodging Expense Form (TL2)

## OTHER COMMENTS / QUESTIONS

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