

TAX PREP CHECKLIST

This list will help me get a better picture of your situation and will help me maximum your refund or lower any amount owing!

The Basics:

First time clients please bring a copy of last year's taxes.

- Has your marital status changed
- Have you moved
- Have you had a child
- Did you buy a home
- Did you sell a home
- Did you buy RSP, Stocks, Mutual Funds
- Did you sell/cash RSP, Stocks, Mutual Funds
- Did you attend post-secondary
- Did you start a new business
- Did you travel for medical reasons

Income Information:

- Farming or Fishing Income
- Rental Income
- Small Business Income
- T2202A Tuition and Education
- T3 Interest Earned
- T4 From All Employers
- T4A Pensions, Grants, Scholarships, Bursaries
- T4A-OAS Old Age Security
- T4AP CPP Benefits
- T4E Unemployment Ins.
- T4RIF Cashed RIF
- T4RSP Cashed RRSP
- T5 Dividends Earned
- T5007 WCB, Social Ass.
- T5008 Mutual Funds
- All other Information Slips

Deductions:

- Adoption Expenses
- Attendant Expenses for Elderly & Disabled
- Auto / Travel Logbook and Expenses**
- Carrying Charges and Interest Exp.
- Charitable Donations
- Child Care Expenses
- Children's Fitness Credit *
- Declaration of Conditions of Employment **
- Disability Tax Credit (If applicable)
- Exams For Professional Certification
- Interest Paid on Student Loans
- Medical Expenses (See Tax Tip for more info)
- Moving Expenses
- Northern Residence
- Office – In Home Expenses **
- Political Contributions
- Professional or Union Dues
- RRSP Contribution Slips
- Search and Rescue Volunteer ***
- Support for Child, Spouse or Common-Law Partner
- Tool Expense for Tradespersons or Apprentice Mechanics **
- Transit Passes
- Volunteer Firefighter ***

Other Items:

- Notice of Assessment or Reassessment
- Custody Documents

* This is the last year for the Children's Fitness Credit

**These items typically require Form T2200 to be issued and signed by your employer

*** A letter will be requested by CRA to ensure you have met the requirements