

## **PERSONAL TAX RETURN LIST**

Following is a checklist that can be used to ensure you have gathered all the necessary information for us to complete your personal income tax return:

### **INCOME**

- T-4 slips (salaries and wages)
- T-4A slips (pensions, CPP, OAS and other)
- T-4E slips (unemployment insurance benefits)
- T-5/T600 slips (interest and dividends)
- T-3 slips (estates, trusts and mutual funds)
- Rental income and expenses, sale of your principal residence or other property
- Self-employment income and expenses (business, professional, farming, fishing etc.)
- Other income (RRSP, RPP, RRIF, annuity, alimony received, interest received, WSIB, death benefits, scholarships, grants, bursaries, social assistance, etc.)

### **DEDUCTIONS/CREDITS**

- RRSP receipts
- Tuition receipts
- Union, professional dues
- Child care expenses (S.I.N., name and address of sitter)
- Fees paid for adopting a child
- Moving expenses
- Donations
- Medical expenses
- Education deduction slip T2202 (self or dependent, signed by dependent as permission to transfer credit)
- Employment expense form T2200 or TL2 (signed by employer)
- Other deductions (carrying charges, safety deposit box, investment council fee, interest, alimony paid)
- Political contributions
- Amount of property taxes paid in the year
- Receipt for rent paid in the year showing to whom paid and address

### **OTHER**

- Income tax instalments, final statement indicating total for the year
- Notice of assessment for the previous tax year
- Investment transaction summaries (including mutual fund statements & brokers' statements)