



**PLEASE USE THIS CHECKLIST TO ASSIST YOU IN ASSEMBLING ALL OF YOUR INFORMATION
TO ENSURE EFFICIENT PREPARATION OF YOUR INCOME TAX RETURN.**

Income Slips:

- T4 Slips from your employer
- T3 slips from trusts, mutual funds
- T5 slips from your bank or investment advisor
- T4A slips for pensions and annuities
- T4A(OAS) slips for old age security
- T4A(P) slips for pension benefits
- T4RIF slips for income from a RRIF
- T4RSP slips income from RRSP withdrawals
- T4E slips for EI benefits received

Business and Professional Income:

- Summary of revenue earned during the year
- Summary of expenses incurred in the year. Some examples are: advertising; supplies, leasing costs; insurance; interest and bank charges; repairs; office; meals and entertainment; rent; travel; utilities and automobile including % used to earn income
- Details of purchases and sales of assets
- Details of GST collected and paid if GST registered
- GST access code if we are filing your GST return

Taxable Capital Gains:

- Summary of sales transactions during the year from your investment advisor
- Details of the purchase or sale of property including copies of legal documents, legal and accounting fees incurred and other expenses

Rental Income:

- Summary of rent received for each property
- Summary of expenses incurred, including property taxes, insurance, repairs, interest, utilities, and advertising costs.

Deduction Receipts:

- RRSP contribution slips
- Annual union due or professional fee receipts
- Child care expense receipts
- Moving expenses
- Qualifying child maintenance payments
- Tuition receipts including those for dependants
- Medical expense receipts, if greater than 3% of your net income
- Charitable donations
- Political donations

Other Information slips:

- T101 Tax shelter slips and financial statements
- T5008 Statement of securities transactions
- T5007 slip for Workers' Compensation
- T5013 Statement of partnership income

Other Items:

- Previous year's Notice of Assessment
- Please advise us of any changes in your contact information and marital status
- Details of changes in dependants
- Child and Spousal support payments if agreement was made prior to May 01, 1997
- Statement of interest expenses if you have borrowed for investment purposes
- T-2202 tuition and education, if transferred from child, please have your child to sign and complete the form
- Sale of principal residence
- Details of any investments outside Canada costing over \$100,000 in total at any time in the year, including foreign company shares held in Canadian investment account
- Employment expenses
 - T2200 completed and signed by employer
 - GST370 completed and signed by employer
 - Summary of employment expenses:
 - % use of automobile expenses (e.g., fuel, R&M, insurance, parking, and lease payments)
 - % use of home expenses (e.g., utilities, R&M; insurance, property taxes and rent)