

ACCOUNTABLE^{LLP}

CHARTERED PROFESSIONAL ACCOUNTANTS

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tel. 519-669-5131 | fax. 519-669-1926

PERSONAL INCOME TAX CHECKLIST

Visit our new website: accountablellp.ca

Name : _____

Contact at : _____

Important Documents to bring

- Investment transaction summaries (*including mutual fund statements & brokers' statements*)

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, information on the 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

- RRSP receipts
 Union, professional dues
 Child care expenses (*S.I.N., name and address of sitter*)
 Moving expenses
 Employment expense form T2200 or TL2 (*signed by employer*)
 Other deductions (*carrying charges and interest, investment counsel fees, alimony paid, interest on student loans*)
 Did you work at home, if so how many days

Credits

- Donation receipts, Political contributions
 Medical expenses
 Tuition/Education deduction slip T2202 (*self or dependant*)
 Amount of property taxes paid in the year
 Receipt for rent paid in the year showing to whom paid and address
 Income tax instalments, final statement indicating total for the year