



**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
- T5 slips from your bank or broker
- T3 slips from trusts, mutual funds
- T4U slips for EI benefits received
- T4A slips for pensions and annuities
- T4A(OAS) slips for old age security
- T4A(P) slips for pension benefits
- RC-62 Universal child care benefit

***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
- Monthly public transit passes and receipts
- Receipts for children's fitness payments
- Receipts for children's arts tax credit
- Tradesperson's tools purchase receipts
- Eligible educator school supply receipts

***Other Information slips:***

- Copy of Notice of Assessment
- T101 Tax shelter slips and financial statements
- T4RSP slips for withdrawal of RRSP funds
- T5007 slip for Workers' Compensation

***Other Items:***

- 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)