

# PERSONAL TAX RETURN DOCUMENTS CHECKLIST

## DEDUCTIONS

- RRSP
- Donation Receipts
- Federal and Provincial Political Contribution
- First Time Home Buyer Amount (2009 & after)
- Professional Dues
- Professional Liability Insurance
- Child Day Care / Baby Sitting Expenses
- Expenses to Find Private Baby Sitter
- Children School Lunch Fees
- Children Preschool Registration and Fees
- Medical Insurance & Expenses
- Medical Insurance with Employer (Bring Dec. Pay Stub)
- Travel Insurance to Visit Outside of Canada
- Medical Expenses Outside of Canada including Travel Expenses
- T2201 - Disability Tax Credit
- Family Caregiver Amount for Infirm
- Moving Expenses-Employment/Full Time Study
  - Personal Travel, Household Stuff Moving
  - Realtor Commission on Sale of Old House
  - Any Repair to Old House for Sale
  - Legal Fees on Sale of Old House
  - Legal Fees on Purchase of New House
  - Vehicle Inspection & Registration at New Prov.
- Split Pension Income with Spouse (T1032)
- Eligible Dependent - Child/Parent/Grandparent
- T2202A - Tuition Fee Receipt
- TL-11A Tuition Fee Outside of Canada
- Previous Years Tuition Fee Carried Forward Amt.
- Student Loan Interest
- Investment Loan Interest
- T2200 - Employment Expenses (T777)
- Long Haul Truck Driver's Meal Expenses (TL2)
- Northern Residents Deduction For Each Individual (T2222)
- Tools for Handyman
- Adoption Expenses
- Spousal Support

## DEDUCTIONS (Continued)

- Legal Expenses Paid During the Year to:
  - Collect Retiring Allowance or Pension
  - Collect Salary / Wages
  - Collect/Increase Support Payment
  - Appeal a Tax Assessment
- Repayment Made During the Year of:
  - Wage Loss Insurance Benefits
  - Salary / Wages
  - CPP Benefit Received in Previous Years

E. & O.E.

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## PERSONAL/SPOUSAL INFORMATION

- SIN  Name  DOB  Address

## DEPENDENTS - LIVING WITH YOU

### CHILDREN/PARENTS/GRANDPARENTS

- SIN  Name  DOB  Relation

## INCOME DOCUMENTS

- T4  T4A  T4E  T4RSP
- T4A(P)  T4A (OAS)  T4RIF  T5007
- T5008  T3  T5  T5013
- Rental Income & Expenses (T776)
- Capital Gain/Loss From Shares/Real Property
- Self Employed Income & Expenses (T2125)

*Don't keep us as a secret, spread our business to your Family, Friends and Co-workers.*

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CORPORATE ACCOUNTS, PERSONAL TAX RETURNS & CONSULTATION

**"Two Locations to Serve You"**

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