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 (Bring Dec. Pay Stub)
  - Medical Insurance with Employer
  - Travel Insurance to Visit Outside of Canada
  - Medical Expenses Outside of Canada including Travel Expenses
  - Medical Expenses for Surrogacy
  - Medical Expenses for IVF Treatment
- ☐ T2201 - Disability Tax Credit
- ☐ Home Accessibility Expense for Disabled People
- ☐ Family Caregiver Amount for Infirm
- ☐ Multi-Generational Home Renovation
- ☐ 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)

DEDUCTIONS (Continued)

- ☐ School Supply Credit for Teachers
- ☐ Long Haul Truck Driver's Meal Expenses (TL2)
- ☐ Northern Residents Deduction For Each Individual (T2222)
- ☐ Tools for Handyman
- ☐ Labour Mobility Deduction for Handyman
- ☐ Adoption Expenses
- ☐ Spousal Support Payments Made
- ☐ 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
- ☐ Air Quality Improvement
- ☐ Digital News Subscription Expenses
- ☐ Volunteer Fire Fighter/Search & Rescue

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)
- ☐ Spousal Support Payments Received

E. & O.E.

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