



Personal Checklist

To ensure the greatest tax savings, we have provided a checklist for you of what to bring.

Family Information

- Full Name of Spouse 1 _____ Full Name of Spouse 2 _____
- Full Name of Dependant 1 _____ Full Name of Dependant 2 _____
- Full Name of Dependant 3 _____ Full Name of Dependant 4 _____
- Current Residential Address _____
- Social Insurance Number _____ Date of Birth _____
- Contact Numbers (Home, cell, office) _____
- Previous year's notice of assessment
- Information Slips (T4, T3, T5, T4E, T4A, T4AP, etc)
- RRSP receipts
- Tuition receipts and education certificates
- Receipts for professional or union fees
- Receipts for medical expenses, charitable donations and political contributions

Income

- Employment income
- Pension benefits, incl. OAS & CPP
- Employment insurance benefits
- Social assistance and SCB benefits
- Interest and dividends
- Sale of stocks, bonds or real estate
- Spousal or child support received
- RRSP income or withdrawals
- Rental Income
- Business, farm or fishing income
- Miscellaneous income

Deductions and Credits

- RRSP and RPP contributions
- Child care expenses
- Union or professional dues
- Moving expenses
- Spousal or child support paid
- Carrying charges and interest expenses
- Employment Expenses with form (T2200)
- Claim for meals and lodging for transport drivers with signed form (TL2)
- GST credit on employment expenses with attached signed form (GST 370) and employee GST Number
- GST credit and/or rebate
- Age credit or pension credit
- Spouse or equivalent-to-spouse credit
- Disability credit
- Tuition fees and education credit
- Transfer of spouses unused credits
- Medical expenses, charitable donations and political contributions
- Property taxes and/or rent (where app.)
- Employment expenses
- Stock option and shares deduction
- Northern residents deductions
- Transit Pass Credit (need passes)
- Children Fitness Tax Credit (up to \$500/ child)
- Adoption expenses
- Interest on student loans
- Caregiver amount