

*PERSONAL INCOME TAX CHECKLIST - 2015*

To prepare your tax return, we will need the following information and documents as they apply to you:

<i>INCOME</i>	<i>DOCUMENTS</i>
<input type="checkbox"/> Salaries, wages, commissions, fees, allowances	T4, T4A
<input type="checkbox"/> Pensions	T4A, T4AP, T4A(OAS), T4(RIF), T4A (RCA)
<input type="checkbox"/> Social Assistance/WSIB	T5007
<input type="checkbox"/> EI Benefits	T4E
<input type="checkbox"/> Investments - Interest, Dividends, Foreign Income	T5, T4PS, T600, T3, T5008, T5013
<input type="checkbox"/> Capital Gains and Losses	Buy/Sell slips, T3, T4PS, T5, Broker Summaries
<input type="checkbox"/> Rental Income	Income and expenses
<input type="checkbox"/> Alimony, child support or separation allowances	Amount
<input type="checkbox"/> Registered Retirement Savings Plan Income	T4RSP
<input type="checkbox"/> Other Income (retiring allowances, scholarships etc.)	T4A, Listing of Income
<input type="checkbox"/> Income and Expenses from Self Employment	Listing, receipts or financial statements
<input type="checkbox"/> Universal Child Care Benefit	RC62

## *DEDUCTIONS and CREDITS*

- |   |   |
|---|---|
| <input type="checkbox"/> Allowable employment expenses<br>(auto, travel etc.)   | T2200 from employer, receipts   |
| <input type="checkbox"/> R.R.S.P. contributions   | Official receipts   |
| <input type="checkbox"/> Use of Home Buyers Plan  | Revenue Canada statement  |
| <input type="checkbox"/> Union or professional dues   | Official receipts   |
| <input type="checkbox"/> Tuition fees   | T2202A or TL11  |
| <input type="checkbox"/> Child care expenses  | Receipts including name, address and social insurance number of payee |
| <input type="checkbox"/> Investment carrying charges - loan interest for investments, safe custody fees, accounting fees, investment counsel fees | Receipts  |
| <input type="checkbox"/> Moving expenses (job related move)   | Receipts  |
| <input type="checkbox"/> Alimony or child support paid  | Name and address of recipient and receipts or cancelled cheques       |
| <input type="checkbox"/> Tax shelter investments  | T101, T102, T5013   |
| <input type="checkbox"/> Medical expenses for any twelve month period ending in 2015  | Receipts or annual printout from your pharmacy or dentist             |
| <input type="checkbox"/> Charitable donations   | Receipts  |
| <input type="checkbox"/> Tuition fee transfers  | T2202 or T2202A Tuition receipt                                       |
| <input type="checkbox"/> Ontario Property Tax Credit  | Rent receipt from landlord; or for property tax receipt               |



- If you purchased your first home in 2015, provide your Statement of Adjustments so that you may apply for the First Time Home Buyer's Credit.
  
- Your E mail address.
  
- Notice of Assessment and for new clients last year's Income Tax Return.
  
- Do you want Direct Deposit? If yes provide void cheque.
  
- Do you want to authorize the Canada Revenue Agency to provide Elections Canada with your name, address and birth date to allow Elections Canada to update the National Register of Elections?
  
- Do you own or did you hold Foreign Property at any time in the tax year with a total value of more than \$100,000 Canadian?