

# INFORMATION CHECKLIST

## Personal Information

- Social Insurance Number & Date of Birth
  - o Self
  - o Spouse/Partner
  - o Child \_\_\_\_\_
  - o Child \_\_\_\_\_
  - o Child \_\_\_\_\_
  - o Other \_\_\_\_\_
- Legal Documents – Copies or original for each family member
  - o Birth Certificate(s)/Citizenship
  - o Passport(s)
  - o Healthcard(s)
- Social Insurance Card
- Prior Notice of Assessment(s)
  - o Previous Year \_\_\_\_\_
  - o 2 years prior \_\_\_\_\_
  - o 3 years prior \_\_\_\_\_
- T-Slips - T4, T4A, T4E, T4PS, T10, T101, T5007, T5013, T5018, RC62
- Pensions not reported on T-slips
- Retirement/Pension
- Other Income
  - o Support payments received
  - o All other income (honorariums, Management fees, director's fees)

## Deductions

- Official RRSP Contribution receipts
- Annual professional/union Dues
- Child care expenses
- Moving expenses
- Support payments made
- Carrying charges and interest expense
- Employment expenses – T2200
- Adoption expenses
- First Time Home Buyers Plan

## Other important Information

- Amount of tax instalment(s) paid – if not deducted on paycheque
- Details of Foreign property owned
- Business Investment Losses Income
- Employment income not on T-slip (tips, casual labour)
- Rental Income/Deductions
  - o Prior year accounting fees
  - o Rent Collected
  - o Expenses
  - o Interest paid on loans
  - o Insurance
  - o Utilities
- Self Employed
  - o Income
  - o Expenses
  - o Interest paid on loans
  - o Home office expenses
  - o Utilities
    - o Hydro & Water
    - o Telephone & Internet
    - o Taxes
- Insurance Details
- Medical Documents
- Property taxes
- Mortgage Documents or Statements
- Home Repairs and Maintenance
  - o Receipts and communication(s)
- Charitable donations
- Capital asset receipts – Stocks, Bonds, Property
- Ownership and Sale of other property
- Investment/RRSP
- Students
  - o T-Slips – T3, T5, T5008
  - o T2202 - tuition receipt
- Student loan interest payments
- Home Sale papers and original purchase price
- Vehicle Sale papers and original purchase price
- RESP withdrawal slips