



Chartered Professional Accountant

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## Personal Tax Documents Checklist

The List Below Will Help You Maximize Your Refund and [Report Your Income](#)

T – Slips (Income)	Deductions / Write-Offs
T3 – Investment Income Slips	<a href="#">T2200</a> – Required for Employment Expenses
T4 – Employment Income Slips	<a href="#">Employment</a> Expenses / <a href="#">Summary</a>
T4A – Other Income / Subcontractor Income Report	Tool Expenses (Tradespersons) Listed & Signed by Employer
T4A(OAS) / T4A(P) – Government Pension Slips	<a href="#">ITA Transcript</a> (Apprentices)
T4E – Employment Insurance (EI) Benefits	<a href="#">Labour Mobility Deduction</a> (Tradespersons)
T5 – Investment Income Slips	Professional / Union Due Receipts
T5007 – Social Assistance (WCB) Benefits	RRSP Contribution Receipts - March of Last Year to February of This Year
T5013 – Investment Income Slips	Child Care / Adoption Expenses
T5018 – Subcontractor Income Slips	<a href="#">Registered</a> Charity / Political Donations
	<a href="#">Moving Expenses</a>
Other Income	
<a href="#">Rental</a> Income / Expenses / <a href="#">Summary</a>	T2202A – Tuition Tax Form (Signed)
<a href="#">Business</a> Income / Expenses / <a href="#">Summary</a>	<a href="#">TL11A</a> – Foreign Tuition Tax Form
Gain / Loss / Sale of Investment Documents	Interest Paid on <a href="#">Eligible</a> Student Loans
Original Purchase & Sale ‘Statement of Adjustments’ for Real Estate Sales	Exam Costs for Professional Certifications
Spousal Support Income Received (Added Up)	<a href="#">Northern Residence Deductions</a> (Location / Days Spent / Trip Details / Cost)
	School Teacher <a href="#">Expenses &amp; Supplies</a>
	Spousal Support Payments Made (Added Up)
Other Items	
Tips Received / Estimated (Taxi Driver / Server)	Interest / Broker Costs for Investments
Separation / Divorce Agreement	Medical Expenses or <a href="#">Summary</a>
Prior Year Income Tax Return (New Clients)	Seniors (Over 65) Home Renovation Costs (Undertaken for Mobility Reasons)
	<a href="#">Multigenerational Home Renovation Costs</a>
<a href="#">Getting Services Started</a>	
<b>Step 1:</b> <a href="#">Intake</a> (New Clients) or <a href="#">Update</a> (Returning Clients) Form Completed	
<b>Step 2:</b> Provide Your Documents (see above) - Options Listed <a href="#">Here</a>	

### What we don't need:

- GST/HST Credit Statements are not needed
- Registered Investment Statements (RRSPs, TFSA, RRIFs, or RESPs) are not needed
- School activity fees and busing fees for your children are not tax deductible
- Fitness / art activity costs for your children are not deductible unless they are Child Care
- Tuition & textbook receipts or cost summaries (only deductible via T2202A/TL11A Tax Form)

### Deadline Reminders:

- Aim to [Get Your Services Started](#) sometime in March for the best services 😊
- Most tax returns need to be [e-filed and paid](#) by April 30<sup>th</sup> to avoid interest and penalties

\* Helping our clients thrive through excellent accounting, tax, and mentorship solutions. \*