



AXE THE TAXES

Accounting Services



100% Métis Owned

Handy Tax Checklist

Slips:

- Employment income (T4)
- Employment insurance benefits (T4E)
- Pensions & annuity income (T4A)
- CPP & OAS [T4A(P) & T4A(OAS)]
- Investment income (T3, T5, & T5008)
- Partnership income (T5013)
- Tuition (T2202A or TL11)
- Social assistance & Worker's Comp
- RRSP & RIF income (T4RSP, T4RIF)
- All other tax slips

Other Documentation:

- Drop-off information checklist for new client's (or changes)
- Last year's return (helpful if new client)
- Capital gain/loss information (if no T5008)
- Spousal support or alimony information
- Information about the sale of your principal residence
- Disability tax credit certificate (T2201)
- Business income and expenses categorized (T2125) (See Page 3)
- Employment expenses categorized (T4044) & (T2200)
- Rental property income & expenses categorized (T4002)
- Volunteer firefighter / search & rescue certificate
- Graduate retention certificate (Saskatchewan)
- Northern residents' letter

(Continued on next page)

Receipts:

- RRSP contributions
- Charitable & political donations
- Medical expenses / travel (80 km+)
- Childcare / preschool / day camp expenses
- Adoption expenses
- Student loan interest statements
- Professional or union dues (if not on T4)
- Investment advisor fees & interest expenses
- Moving expenses (40 km+ for work)
- School supply expenses (teachers only)
- Tool expenses (tradesperson & apprentice mechanic)
- Exam fees for professional designations
- Legal expenses to collect spousal support / alimony, pension or retiring allowance
- Home accessibility expenses (senior or eligible for disability credit)
- Rent or property tax (Manitoba & Ontario only)