

Completing your income tax return can seem like a daunting task, even with the help of an accountant. Consider using the following checklist to help ensure you have the right information and documentation available to make this tax season a smooth one.

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General Items

- ☐ A copy of last year's return
- ☐ 2015 Notice of Assessment
- ☐ Other years reassessments
- ☐ Details of changes to your personal status such as dates of marriage, separation, divorce or widowed, births and deaths
- ☐ Note consenting to provide your income tax information to Elections Canada
- ☐ Instalment payments
- ☐ Details of foreign property holdings (if any*) including cost of property held

Income

- ☐ Universal child care benefit (RC62)
- ☐ Employment income (T4)
- ☐ Pension income (T4A, T4A(P), T4RIF, T4RSP)
- ☐ US social security
- ☐ Old age security (T4OAS)
- ☐ Investment income (T5)
- ☐ Income from trusts such as mutual fund investments (T3)
- ☐ Income from employment insurance (T4E)
- ☐ Income from partnerships (T5013)
- ☐ Workers compensation/social assistance payments (T5007)
- ☐ Details of the sale of securities such as stocks and bonds (eg. trading summary from your broker)
- ☐ Income from foreign investments
- ☐ Spousal support payments received

Deductions - General

- ☐ RRSP contributions
- ☐ Medical, dental, prescription drugs, nursing home expenses
- ☐ Payments to a private health insurance plan
- ☐ Charitable donations
- ☐ Tuition fees/education amount (T2202A) for yourself or transferred from a dependent such as a child or grandchild
- ☐ Interest paid on student loans
- ☐ Professional dues, union dues
- ☐ Public transit passes
- ☐ Children's participation in programs related to physical activity
- ☐ Interest on loans assumed to purchase investments
- ☐ Safety deposit box fees
- ☐ Professional consultant fees
- ☐ Legal fees paid to establish child or spousal support or to enforce a pre-existing agreement
- ☐ Legal fees paid to recover wages from your employer
- ☐ Details of people you support and their medical status
- ☐ Child care receipts (for camp, list dates attended)
- ☐ Moving expenses if you moved 40km or closer to work or school
- ☐ Property taxes or residential rent paid and to whom
- ☐ Political contributions receipts
- ☐ Disability tax credit claim form completed by authorized health practitioner (T2201)
- ☐ Spousal support payments paid
- ☐ Adoption expenses

Deductions – Employees

- ☐ Declaration of conditions of employment form (T2200)
- ☐ Details of expenses not reimbursed by your employer including travel expenses (eg. parking, taxis, bus fare), supplies and assistant salaries
- ☐ Office rent if required as a condition of employment
- ☐ Home office expenses if it is your principal workplace or used exclusively, on a regular or continuous basis for activities such as business-related meetings; include details of rent paid, repairs and maintenance costs, utilities and if you are a commissioned salesperson also property taxes and home insurance. Also indicate the total area of your home and the area used for your workspace.
- ☐ If you are a commissioned salesperson, details supporting advertising expenses, promotion, meals and entertainment
- ☐ Motor vehicle expenses †

† Deductions – Motor Vehicles

- ☐ Total kilometers driven and kilometers driven just for work
- ☐ Details of total expenses incurred for gas, maintenance and repairs, insurance, license and registration, loan interest and lease payments
- ☐ New vehicle, purchase invoice/agreement

Unincorporated Businesses

- ☐ Total sales revenue for the year
- ☐ Total expenses listed by category for the year
- ☐ Capital assets acquired (eg. computers and peripherals, furniture and equipment)
- ☐ Home office expenses – include details of rent paid or if you own your home, details of repairs and maintenance, utilities, property taxes, insurance, mortgage interest
- ☐ Motor vehicle expenses †

Rental Properties

- ☐ Address and number of units
- ☐ Rental income by unit
- ☐ Rental expenses by unit by category of expense
- ☐ Motor vehicle expenses †
- ☐ Partners' names, addresses and SIN's

Personal Properties – details of sale of personal home



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