

TAX INFO CHECKLIST

- T4
- T4A
- T4PS
- T4 (OAS)
- T4APS
- T4RSP
- T4RIF
- T4E
- T4U
- T5007 Social Assistance
- T5013
- T5 Slips and/or T3 Interest and other investment slips
- RRSP Contribution Receipts
- T2200 Declaration of Conditions of Employment
- T600 Coupon Payments on Bonds
- Receipts for Administrative Costs on Self-directed RRSP Plans
- Charitable Donation Receipts
- Medical Expenses (Total amounts)
- Union Dues
- Alimony Payments
- Tuition Fees
- Disability
- Moving Expenses
- Rent Paid
- Investment Loan Interest
- Safety Deposits
- Legal Fees
- Charitable Donations
- Political Party Contributions

If you own a rental property please provide the following (if applicable):

- Summary of rental income for each property
- Summary of expenses sorted by category (e.g. repairs and maintenance, property taxes, mortgage, interest, etc.) for each property

If you sold any capital properties please provide us with information on the selling and cost price of each property.

If you are self-employed please provide the following:

- Copy of Financial Statements (if available)
- Company Bank Statements

If we are to prepare the financial statements for your business, we will need the following:

- Bank Statements/Cancelled cheques
- Expense (receipts added up in each category)
- Rent, Insurance, Utility Expenses
- Payroll
- List of Accounts Receivable
- List of Accounts Payable
- Copies of contracts for equipment or other asset purchases
- Car Expenses and Mileage Logs
- T5013 Partnership income (if applicable) and copy of current financial statements
- Comments or Instructions