



Preparing your Personal Income Taxes 2016 edition

Please take a look at the below checklist and add only the necessary information that applies to you.

Please note: If there are items missing to hand in at a later date, please notify us and provide prior to your filing due date. Attach all receipts with this list.

Client Name: _____

Full Address: _____

Phone: _____

Email Address: _____

Types of Income to report

- Employment Income (T4)
- Old Age Security Pension (T4A)
- Canada and/or Quebec Pension (T4AP)
- Universal Child Care Benefits (RC62)
- Employment Insurance & Other Benefits (T4E)
- Income from Trust (T3)
- Dividend and Interest Income (T5)
- Registered Retirement Income R.R.S.P. (T4RSP)
- Registered Income Fund (T4RIF)
- Workers' Compensation/Social Assistance (T5007)
- Partnership Income (T5013)
- Spousal support received
- Sale of Stock or real estate
(provide documentation for purchase and sale)
- Other types of income
 - Business
 - Rental
 - Farming*(ask for additional summary from our office)*
- Pensions from outside Canada

Items to calculate Credits

- RRSP Contributions
- Union, Professional Dues Paid
- Child Care Expenses (Schools, Camps, etc)
- Children's Arts Tax Credit/Fitness Amounts invoices
- Tuition Fees (T2202A)
(If child transferring to parent, slip must be signed by student)
- Interest paid on Student Loans
- Donation and Political contributions
- Monthly/annual public transit statements
- Medical Receipts for all family members
- Spousal Support Payments Made
(Provide separation agreement if first time reporting)
- Property Taxes or Rent Paid and to whom
- Employment Expenses (only if signed T2200)
(ask for additional summary from our office)

Additional items to remember to bring or tell us about

- Previous years Notice of Assessment
- Purchase of first home (bring purchase docs)
- Amounts paid in installments for Income tax
- Changes to your marital status
- Changes in custody/guardianship of children
- New baby or elderly family member joining household



Airikka Passmore
& Associates LTD.