



Preparing your Personal Income Taxes ❖ 2018 edition v.19

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

Types of Income to report		Items to Calculate Credits	
<input type="checkbox"/>	T4 or T4A- Employment/Commission Income	<input type="checkbox"/>	Adoption costs
<input type="checkbox"/>	T4P- Canada and or Quebec Pension	<input type="checkbox"/>	Childcare expenses
<input type="checkbox"/>	T4AOAS- Old Age Security Pension	<input type="checkbox"/>	Claim for Meals and Lodging <i>(Transport Employees)</i>
<input type="checkbox"/>	T4E- Employment Insurance and other benefits		<i>(only if signed TL2)</i>
<input type="checkbox"/>	T3- Income from Trust	<input type="checkbox"/>	Donation & Political contributions <i>(Slips required)</i>
<input type="checkbox"/>	Foreign Income received	<input type="checkbox"/>	Employment Expenses (only if signed T2200)
<input type="checkbox"/>	T5- Dividend and Interest Income	<input type="checkbox"/>	Fertility treatment receipts
<input type="checkbox"/>	T4RSP- RRSP income	<input type="checkbox"/>	Interest paid on student loan
<input type="checkbox"/>	T4RIF- Registered Income Fund	<input type="checkbox"/>	Union dues, Professional dues paid
<input type="checkbox"/>	T5007- Workers Comp/Social assistance	<input type="checkbox"/>	Management fees paid on non-reg. investments
<input type="checkbox"/>	T5013- Partnership Income	<input type="checkbox"/>	Medical receipts for all family members
<input type="checkbox"/>	Spousal Support Received	<input type="checkbox"/>	Property tax statement or rent receipts
<input type="checkbox"/>	Sales of stocks or real estate (provide details)		<i>(If child transferring to parent, slip must be signed)</i>
<input type="checkbox"/>	Other income types:	<input type="checkbox"/>	RRSP Contributions
	<input type="checkbox"/> Business <input type="checkbox"/> Rental <input type="checkbox"/> Pension outside Can.	<input type="checkbox"/>	Spousal Support payments made
	<i>(ask for additional summary from our office)</i>		<i>(Provide separation agreement if first time reporting)</i>
<input type="checkbox"/>	If driving for UBER or renting through AirBNB	<input type="checkbox"/>	Tuition Fees- T2202A
Additional Items to remember to bring with you or tell us about			
<input type="checkbox"/>	Foreign property valued over \$100K CAN	<input type="checkbox"/>	Changes to marital status <i>(need date of change)</i>
<input type="checkbox"/>	Purchase of first home <i>(bring purchase docs)</i>	<input type="checkbox"/>	Changes to custody/guardianship of children
<input type="checkbox"/>	Amounts paid in installments for income tax	<input type="checkbox"/>	New baby or elderly family member joined household
<input type="checkbox"/>	Sale of Principal Residence	<input type="checkbox"/>	Member of the household became disabled
	<i>(provide sale docs, original purchase date and amount)</i>	<input type="checkbox"/>	Previous tax return <i>(only if new client)</i>

If there are items missing you still need to bring in, please notify us and provide prior to your filing due date. Attach all receipts with this list.