



Chartered Professional Accountants

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***PLEASE USE THE FOLLOWING LIST TO ASSIST YOU IN COMPILING YOUR PERSONAL TAX INFORMATION:***

**Income (Include all information slips THAT APPLY TO YOU) NOTE: To avoid a failure to report income penalty, please submit any additional/late information slips as soon as possible.**

- T4 – Employment income
- T4A – Pensions, CERB and other income
- T4E – Employment insurance
- T4PS – Statement of Employee Profit Sharing Plan Allocations and payments
- T4 RSP – RRSP withdrawals
- T4 RIF – RIF payments
- T3 – Trust income (mailed as late as March 31)
- T5 – Interest and dividend income
- Other slips including T10, T2200, T2202, T101, TL11A, B, C and D, T5003, T5007, T5008, T5013, T5018
- Business income (statement of income and expense) *Do you earn income through internet business activity?*
- Farm income (statement of income and expense)
  - Do you have an AgriInvest PIN? Yes  No  If yes, PIN: \_\_\_\_\_
- Rental property (statement of income and expense and any documents on capital purchases or sales)
- Capital gains & losses realized (including stock and mutual funds)
- Sale of capital property
- Alimony, separation allowances, child maintenance (including divorce/separation agreement)
- Interest income received and/or earned but not yet received

**Deductions (Please provide all receipts) THAT APPLY TO YOU**

- RRSP contributions (please indicate if repayment of LLP- lifelong learning plan or HBP-home buyers' plan)
- RRSP withdrawals for LLP- lifelong learning plan or HBP-home buyers' plan
- FHSA, First Home Savings Plan, contributions
- Employment expenses (T2200 filled out and signed by employer) **(Submit mileage log book for motor vehicle expenses, if applicable.)**
- Work-space-in-the-home details; T2200 from employer; square footage of workspace; period of time worked at home.
- Tuition receipts (T2202, TL11A, B, C or D)
- Interest paid on student loans
- Investment expenses (interest on money borrowed to purchase investments & investment counsel fees)
- Tradespeople /Apprentice Mechanics –list of **new** tools acquired, T2200 and list of receipts signed by employer
- Union or professional dues
- Charitable donations and/or political contributions
- Alimony, separation allowances or deductible child support payments paid during the year (copy of any new agreement)
- Childcare expenses (provide receipts with SIN of provider)
- Adoption related expenses
- Receipts to renovate your home to gain access/increase functionality if you are over 65 or eligible for the disability tax credit
- Receipts for teaching supplies used in a school/regulated child care facility by a certified teacher/early childhood educator
- Medical expenses for you or your dependents (prescription drugs, dental, private health care premiums, long term care and medical travel – worksheet provided)
- Moving expenses – if greater than 40 kms for new work or school location
- Travel in a Prescribed Zone – see attached worksheet

Date: \_\_\_\_\_ Interviewee: \_\_\_\_\_ Interviewer: \_\_\_\_\_

