



Let's simplify this tax season - use the following checklist to ensure you have a complete set of documents before preparing your tax return for filing.

YOUR INFORMATION:

Name: _____

Address: _____

City: _____ Province: _____

Postal Code: _____ Telephone: _____

Date of Birth (mm/dd/yyyy): _____

Social Insurance Number (SIN): _____

Are you a Canadian Citizen: YES _____ NO _____

Marital Status as of December 31, 2012: _____

If your marital status changed during 2012 please indicate the effective date of the change in status (mm/dd/yyyy): _____ Please provide supporting documentation.

SPOUSE'S INFORMATION (IF APPLICABLE):

Name: _____

Address: _____

City: _____ Province: _____

Postal Code: _____ Telephone: _____

Date of Birth (mm/dd/yyyy): _____

Social Insurance Number (SIN): _____

Are you a Canadian Citizen: YES _____ NO _____

DEPENDENT INFORMATION (IF APPLICABLE):

Name : _____

Date of Birth (mm/dd/yyyy): _____ SIN: _____

Relationship: _____

Name : _____

Date of Birth (mm/dd/yyyy): _____ SIN: _____

Relationship: _____

Name : _____

Date of Birth (mm/dd/yyyy): _____ SIN: _____

Relationship: _____

*If more space is required for dependents please provide on a separate sheet of paper***INFORMATION AND ITEMS REQUIRED:**

- ✓ 2011 Notice of Assessment
- ✓ Total amount of tax instalments made throughout the year
- ✓ Did you receive the Universal Child Care Benefit? Please provide details
- ✓ Did you have any investments? Did you have any capital gains or losses on investments? Please provide all documentation
- ✓ Do you own foreign property? Do you have any foreign income?
- ✓ RRSP Homebuyer and education withdrawal and repayment information
- ✓ Prior year's income tax return

INFORMATION SLIPS TO INCLUDE (IF APPLICABLE):

- ✓ T4 - Employment
- ✓ T4A - Commission and other income
- ✓ T4A(P) - Canada Pension Plan Benefits
- ✓ T4E - Employment Insurance
- ✓ T4RIF – Registered Income Fund
- ✓ T4OAS - Old Age Security
- ✓ T4RSP – Retirement Savings Plan Income
- ✓ T5 – Investment Income
- ✓ T5007 – WSIB or Social Assistance payments
- ✓ T5013 – Partnership Income

- ✓ T3 – Income from Trusts
- ✓ T2200 – Declaration of Conditions of Employment
- ✓ RRSP Contribution slips
- ✓ Tuition Fees/Education Amounts (T2202A)

DEDUCTIBLE EXPENSES:

- ✓ Child care information – receipts are required with name and dates and if an individual you must provide their social insurance number
- ✓ Child physical activity receipts
- ✓ Charitable donations
- ✓ Public transit passes
- ✓ Political contributions
- ✓ Moving expense
- ✓ Medical receipts and Private Medical Benefits receipts
- ✓ Employment expenses
- ✓ Legal fees
- ✓ Safety deposit box
- ✓ Spousal support – income and payments
- ✓ Property taxes – roll number required as well as township name taxes are payable to
- ✓ Rent expenses – dates, total amount and landlord's full information
- ✓ Union dues, professional dues, consultant fees
- ✓ Loan interest and carrying charges
- ✓ Student loan interest

BUSINESS/SELF-EMPLOYMENT INCOME (UNINCORPORATED):

- ✓ Revenue and expenses for the year (complete statement showing all business activities)
- ✓ Business investments – provide details
- ✓ Loans payable – provide details
- ✓ Asset Additions – provide details and receipts
- ✓ Business Use of Home – Total square footage of home and square footage of office space, utilities, mortgage interest, repairs and maintenance, insurance
- ✓ Vehicle Usage for Business – Total kilometres driven in the year, total kilometres driven for business, vehicle details, vehicle repairs, gas and oil costs, repairs and maintenance, insurance, parking, leasing or purchase details