



Personal Income Tax Information Checklist

Use this checklist to ensure that you have received all the tax slips you are expecting and that you have collected all the other paperwork needed to support any tax credits you intend to claim for the year.

Information Slips

Employment Slips

T4 / T4A - Employment / Commission Income / Director's Fees

T4PS - Employee Profit Sharing

T2200 - Declaration of Conditions of Employment (for out-of-pocket, non-reimbursed employment expenses)

Pension / Retirement Slips

T4A - Pension / Annuity Income

T4A (OAS) - Old Age Security Benefits

T4A (P) - Canada Pension Plan Benefits

T4RSP / T4RIF - Income from RRSP or RIF

Investment Slips

T5 - Interest and Dividend Income

T3 - Mutual Funds and Other Trust Income

T6000 - Canada Savings Bond Income

Gains / Losses from sale of securities, land, or other capitalized assets

Other Common Sources of Income

T5013 - Partnership Income / Tax Shelters

T4E - Employment Insurance Benefit

T5008 - Purchase / Sale of Securities

T101 - Tax Shelters

Foreign Property

All details regarding any property held outside of Canada, including bank accounts, investments, securities, trusts, and real estate.

Official Receipts and Backup for Other Credits

RRSP Contributions and any extra repayments under a Home Buyers Plan or Life Long Learning Plan
Donations - Charitable / Political
Professional / Union Dues
Medical Expenses (including premiums, attendants, nursing and home care)
T2202A - Tuition and Education Credit, for self or transferred from a dependent
Disability Tax Credit
Child Fitness / Child Care Receipts
Moving Expenses
Interest paid on student loan
Volunteer Firefighter Credit
Interest and Carrying Charges (i.e. fees to investment broker or on investment account)
Alimony, Maintenance or Child Support Payments

Farm and Self-Employment Related Items

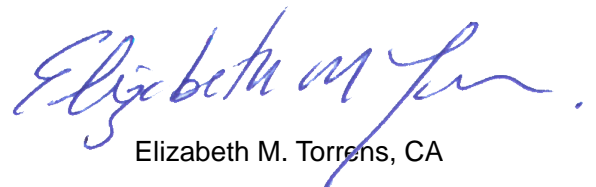
Rental Property income and expense details
Home Based Business income and expense details
Farm income and expense details
Vehicle Log Book, if applicable
Home Office details, if applicable
GST details, if registered or claiming a rebate

Remember to Provide

Details on all installment payments made throughout the year
2013 Notice of Assessment as this details your current RRSP deduction room

Even if you file your taxes yourself, you can always contact me with any questions you may have.

Better to have the information you need to do it right, than need to correct a mistake later that might cost you interest and penalty charges.



Elizabeth M. Torrens, CA