

PERSONAL INCOME TAX RETURN CHECKLIST

INCOME

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| ✓ EMPLOYMENT INCOME | T4 SLIPS |
| ✓ PENSION AND OTHER INCOME | T4A – T4A (OAS) – T4A (CPP) T4RIF |
| ✓ EMPLOYMENT INSURANCE INCOME | T4E SLIP |
| ✓ INVESTMENT INCOME | T3'S – T5'S – T5008 – T600 |
| ✓ RRSP WITHDRAWAL INCOME | T4RSP SLIPS |
| ✓ EMPLOYEE PROFIT SHARING INCOME | T4PS |
| ✓ WORKERS COMPENSATION | T5007 |
| ✓ SOCIAL ASSISTANCE INCOME | T5007 |

INCOME FOR WHICH NO "T" SLIPS HAVE BEEN RECEIVED

- ✓ BUSINESS INCOME
- ✓ RENTAL INCOME
- ✓ EXECUTOR FEES
- ✓ OTHER EMPLOYMENT INCOME
- ✓ SPOUSAL SUPPORT
- ✓ CHILD SUPPORT (AGREEMENT BEFORE MAY 1, 1997)
- ✓ CAPITAL GAINS
- ✓ FOREIGN INCOME (RESIDENTS OF CANADA **MUST** REPORT WORLD-WIDE INCOME)
- ✓ REPORT SALE OF PRINCIPLE RESIDENCE OR COTTAGE

DEDUCTIONS FROM INCOME

- ✓ RRSP CONTRIBUTION RECEIPTS
- ✓ UNION/PROFESSIONAL FEES (NOT INCLUDED IN A T4) RECEIPTS REQUIRED
- ✓ CHILD CARE EXPENSES - WE NEED NAME, ADDRESS AND S.I.N. OF CAREGIVER OR RECEIPT FROM DAY CARE
- ✓ MOVING EXPENSES
- ✓ SUPPORT PAYMENTS PAID
- ✓ EMPLOYMENT EXPENSES – VEHICLE EXPENSES-MEALS-LODGING
- ✓ CARRYING CHARGES
- ✓ INTEREST PAID ON LOAN TO EARN INVESTMENT INCOME
- ✓ SENIOR PUBLIC TRANSIT PASS RECEIPTS
- ✓ ADOPTION EXPENSES
- ✓ FIRST TIME HOME BUYERS (STATEMENT OF ADJUSTMENT FROM LAWYER)
- ✓ CHARITABLE DONATION RECEIPTS
- ✓ POLITICAL CONTRIBUTION RECEIPTS
- ✓ MEDICAL RECEIPTS INCLUDING PREMIUMS PAID FOR PRIVATE HEALTH PLANS
- ✓ TUITION RECEIPTS FOR SELF OR TRANSFER FROM CHILD (STUDENT MUST SIGN TRANSFER ON BACK OF FORM)
- ✓ TEACHING SUPPLIES FOR QUALIFIED EDUCATORS
- ✓ RENT OR PROPERTY TAXES PAID DURING THE YEAR (RECEIPTS REQUIRED)
- ✓ INTEREST PAID ON GOVERNMENT STUDENT LOANS
- ✓ RRSP HOME BUYERS PLAN WITHDRAWALS – STATEMENT OF ACCOUNT