

YOUR NAME _____

PERSONAL INCOME TAX CHECKLIST

This checklist is designed to help you gather your information and includes only common tax items. If you have other items not listed here and are unsure about their tax implications, please contact our office, and a staff member will be happy to assist you and answer your questions.

If you require additional copies of this checklist, it is available in the "Client Centre" section of our website at dickson.ca

<u>INCOME</u>	<u>PROVIDE</u>
<i>(check all that apply)</i>	
<input type="checkbox"/> Employment or commission income	T4 or T4A
<input type="checkbox"/> Pension and other income	T4A
<input type="checkbox"/> Scholarships or bursaries	T4A
<input type="checkbox"/> Old Age Security	T4A(OAS)
<input type="checkbox"/> CPP Benefits	T4A(P)
<input type="checkbox"/> Employment insurance benefits	T4E
<input type="checkbox"/> Social Assistance/WCB	T5007
<input type="checkbox"/> Contract payments	T5018
<input type="checkbox"/> RRSP income/withdrawals	T4 RSP
<input type="checkbox"/> FHSA income/withdrawals	T4FHSA
<input type="checkbox"/> RRIF income/withdrawals	T4 RIF
<input type="checkbox"/> Interest and dividend income	T3 or T5
<input type="checkbox"/> Limited partnership income	T5013
<input type="checkbox"/> Statement of security transactions	Gain/loss report
<input type="checkbox"/> Self-employment income	Summary and/or Receipts*
<input type="checkbox"/> Rental income	Summary and/or Receipts*
<input type="checkbox"/> Capital gains/losses	Summary and/or sale documentation
<input type="checkbox"/> Foreign income	Details and/or other tax receipts
<input type="checkbox"/> OTHER _____	T4E or T4A \$ _____
Examples of other income include support payments, income not reported on slips (tips and/or odd jobs), and any other items not noted above.	
<u>OTHER INFORMATION</u>	
<i>(check all that apply)</i>	
<input type="checkbox"/> Income tax instalments paid during year	
<input type="checkbox"/> Prior year notices of assessment and reassessment	
<input type="checkbox"/> Prior year tax return (if you are a new client)	
<input type="checkbox"/> Details of Home Buyer Plan or Lifelong Learning Plan withdrawals or repayments during year	
<input type="checkbox"/> Details of dependants (SIN, DOB)	
<input type="checkbox"/> Documentation for sale of principal residence and/or rental property	
<input type="checkbox"/> OTHER _____	
Any other information that you feel will assist our office with preparing your return.	

<u>DEDUCTIONS</u>	<u>PROVIDE</u>
<i>(check all that apply)</i>	
<input type="checkbox"/> RRSP contributions	Tax Receipts
<input type="checkbox"/> FHSA contributions	Tax Receipts
<input type="checkbox"/> Union, professional dues	Tax Receipts
<input type="checkbox"/> Interest on funds borrowed for investing	Record of amounts paid
<input type="checkbox"/> Investment counsel and accounting fees	Record of amounts paid
<input type="checkbox"/> Employment or commission expenses	T2200 & Summary and/or Receipts*
<input type="checkbox"/> Child care expenses	Summary and/or Receipts
<input type="checkbox"/> Moving expenses	Summary and/or Receipts
<input type="checkbox"/> OTHER _____	\$ _____
<input type="checkbox"/> OTHER _____	\$ _____
Examples of other deductions include support payments, legal expenses incurred to collect income, and any other items not noted above.	
<u>TAX CREDITS</u>	
<i>(check all that apply)</i>	
<input type="checkbox"/> Disability amount	T2201
<input type="checkbox"/> Tuition fees/education credit	T2202 or other tax receipts
<input type="checkbox"/> Interest paid on student loans	Record of amounts paid
<input type="checkbox"/> Medical expenses	Summary and/or Receipts
<input type="checkbox"/> Attendant care expenses	Record of amounts paid
<input type="checkbox"/> Charitable donation receipts	Tax Receipts
<input type="checkbox"/> Political contribution receipts	Tax Receipts
<input type="checkbox"/> First Time Home Buyer credit	Details of new home purchase
<input type="checkbox"/> OTHER _____	\$ _____
<input type="checkbox"/> OTHER _____	\$ _____
Examples of other credits include adoption expenses, taxes paid to other countries and any other items not noted above.	
<u>OFFICE INFORMATION</u>	
Would you like to sign your return electronically?	
<input type="checkbox"/> Yes	<input type="checkbox"/> No Email _____

Thank You!

*Worksheets to assist you in summarizing the information are available on our website at dickson.ca in the "Client Centre" section