

BRABANT & KRETZSCHMANN
CHARTERED PROFESSIONAL ACCOUNTANTS

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A Checklist for next year's income tax preparation:

Income Slips

- T4 Employment Income
- T4A Certain Scholarships
- T4A Other Pensions and Annuities
- T4A(OAS) Old Age Security
- T4AP(CPP)Canada Pension Plan
- T4E Unemployment Insurance (EI)
- T4RSP Retirement Savings Plan
- T4RIF Retirement Income Fund
- T3 Investment Income from Mutual Funds, REITS, ETFs (T3's do not have to be mailed out to clients until March 31)
- T5 Interest and Dividends
- T5007 Social Assistance and Worker's Compensation Payments
- T5008 Income from Securities Transactions
- RC62 Universal Child Care Benefit Statement
- T2200 Declaration of Conditions of Employment
- T2202A Tuition, Education and Textbook Amounts Certificate

Receipts

- Adoption Expenses
- Attendant Expenses for a Disabled Person
- Automobile/Travel Logbook and Expenses
- Business, Farm or Fishing Income/Expenses
- Canada Revenue Agency Correspondence
- Charitable Donations
- Child Care/Child Support Payments/
Children's Fitness and Arts Programs
- Disability Tax Credit Certificate
- Foreign Assets/Property over \$100,000 as
there are extra filing requirements
- Information on Capital Gains in the year on sales
of Investments, Stocks or Real Estate, Realized Gain
or Loss Report from your Investment Advisor
- Medical Expenses (including travel if over 40 kms.)
- Moving Expenses Related to Employment
(greater than 40 Kms.)
- Ontario Healthy Home Renovation costs
incurred by those 65 and older
- Political Donation Receipts
- Prior year's Notice of Assessment from
Canada Revenue Agency
- Property Taxes/Rent Receipts
- Rental Income and Expense Records
- RRSP Contributions
- Spousal Support Payments (paid/received)
- Student Loan Interest
- Tax Instalment Payments made
- Transit Passes or Receipts
- Union and Professional Fees
- Volunteer Firefighters Certification

Please advise us of any changes in the following:

New Dependent(s): Full Name _____ Date of Birth _____

Change in Marital Status: Details _____ Date of Change _____

Change in Address: _____

Change in Telephone Number: _____