
TAX RETURN CHECKLIST Thank you for the opportunity to be of service in filing your income tax return. We have prepared a checklist to ensure that you don't forget to include extraordinary types of income and that you claim all of the deductions to which you are entitled. If you have any questions or are not sure about whether to include certain types income or expense please feel free to contact us.

Payless Income Tax ...Your first step to financial success

Personal Information

- Names, addresses, birth dates and SINS for: you, your spouse, and your children
- Copy of your **last** tax return (if you came to Payless Income Tax last year, we have it on file)
- Copy of your **last** Notice of Assessment or Notice of Reassessment

Sources of Income

- T4 Statement of Employment Income
- T4A Statement of Pension, Retirement, Annuity, Old Age Security, or Other Income
- T4RSP Statement of Income from a Registered Retirement Savings Plan
- R4RIF Statement of Income from a Registered Retirement Income Fund
- T4U Statement of Unemployment Insurance Benefits
- T-5 Statement of Investment Income
- T2200 Statement of Allowable Expenses signed by your employer
- T-5007 Statement of Benefits from WS&IB or Social Assistance
- T5008 Statement of Securities Transactions
- T5013 Statement of Partnership Income
- T3 Supplementary (Capital Gains, etc.)
- T101, T102, T5103 from Exploration and Development Expenses

Official receipts for:

- RRSPs
- Tuition fees
- Union and professional dues
- Prescription drugs, medical expenses
- Charitable donations
- Property tax paid

Receipts for:

- All child care expenses or attendant care expenses for a disabled person
- Moving expenses if you moved 40+km to a new job or work location
- Safety deposit box rental
- Rent paid and name of landlord
- Interest paid on loans for investments
- Business investment consultation fees

Other expenses:

- Commissioned sales person expenses (similar to business expenses)*
- Any legal expenses to collect alimony, pension or retiring allowances
- Information on any business investment losses
- Schedule of purchase and sale of securities, commissions paid