



## TAX INFORMATION CHECKLIST

(APPLICABLE TO ALL TAX YEARS)

Pay particular attention to providing all T3's, T4's and T5's

CRA will not hesitate to penalise you both 10% Federal and 10% Provincial penalties on the gross amount shown on the omitted T3, T4 or T5.

	<b>Yes</b>	<b>No</b>
<b>Completed Tax Information Form (TIF's) FORMS - Personal or Corporate</b> <small>(download from <a href="http://www.dewarmccarthy.com/forms.htm">www.dewarmccarthy.com/forms.htm</a>)</small>	<input type="radio"/>	<input type="radio"/>
<b>Copy of previous years T1 tax return (if available) - for continuity purposes</b>	<input type="radio"/>	<input type="radio"/>
<b>Any correspondence you have received from CRA or from the provincial tax authorities</b>	<input type="radio"/>	<input type="radio"/>
<b>Any of the following varieties of Income Slips (T3, T4, T5)</b>		
Employment income	<input type="radio"/>	<input type="radio"/>
Employment Insurance benefits	<input type="radio"/>	<input type="radio"/>
Other pensions and annuities	<input type="radio"/>	<input type="radio"/>
Old Age Security and CPP benefits	<input type="radio"/>	<input type="radio"/>
Social assistance payments	<input type="radio"/>	<input type="radio"/>
Workers' compensation benefits	<input type="radio"/>	<input type="radio"/>
<b>Supporting documentation - Income</b>		
Specifically:		
Interest and dividends	<input type="radio"/>	<input type="radio"/>
Sale or deemed sale of stocks, bonds, real estate or any other asset	<input type="radio"/>	<input type="radio"/>
<b>Supporting documentation - Deductions</b>		
Adoption expenses	<input type="radio"/>	<input type="radio"/>
Automobile expenses (Logbooks if applicable)	<input type="radio"/>	<input type="radio"/>
Carrying charges and interest expenses	<input type="radio"/>	<input type="radio"/>
Charitable donations	<input type="radio"/>	<input type="radio"/>
Child care expenses	<input type="radio"/>	<input type="radio"/>
Children's fitness programs	<input type="radio"/>	<input type="radio"/>
Interest paid on student loans	<input type="radio"/>	<input type="radio"/>
Medical expenses	<input type="radio"/>	<input type="radio"/>
Moving expenses	<input type="radio"/>	<input type="radio"/>
Office-in-home expenses	<input type="radio"/>	<input type="radio"/>
Professional fees	<input type="radio"/>	<input type="radio"/>
Political contributions	<input type="radio"/>	<input type="radio"/>
RRSP contributions Union dues	<input type="radio"/>	<input type="radio"/>
Support for a child, spouse or common-law partner	<input type="radio"/>	<input type="radio"/>
Tool expenses (tradespersons)	<input type="radio"/>	<input type="radio"/>
Tuition/Education amounts for qualifying students	<input type="radio"/>	<input type="radio"/>
Transit passes	<input type="radio"/>	<input type="radio"/>
Travel expenses	<input type="radio"/>	<input type="radio"/>
<b>Other documentation</b>		
Universal Child Care Benefit confirmation	<input type="radio"/>	<input type="radio"/>
Capital gains/losses records	<input type="radio"/>	<input type="radio"/>
Northern residents deductions	<input type="radio"/>	<input type="radio"/>
Rental income & expense records	<input type="radio"/>	<input type="radio"/>
Business, farm or fishing income & expense records	<input type="radio"/>	<input type="radio"/>
Disability Tax Credit Certificate (T2201)	<input type="radio"/>	<input type="radio"/>

Please review this checklist to make sure we have everything to file your personal income tax. If you have paperwork that is not listed here, or you are not sure about, bring it in and we will make sure to check everything and explain why it can or cannot be used on your personal income tax.