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Personal Income Tax Preparation: CHECKLIST

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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 Green and Company, we will 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, Canada Pension (CPP), Old Age Security (OAS), and Other Income
- T4RSP Statement of Income from a Registered Retirement Savings Plan
- T4RIF Statement of Income from a Registered Retirement Income Fund
- T4E Statement of Unemployment Insurance Benefits
- T5 Statement of Investment Income
- T2200 Statement of Allowable Expenses signed by your employer
- T5007 Statement of Benefits from WSIB 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:

- RRSP Contribution Receipts (including 1st sixty days of the current year)
- Tuition fees (Form T2202A) and receipts for interest paid on student loans
- Union and professional dues
- Prescription drugs, medical expenses
- Charitable donations
- Property tax paid

Receipts for:

- All child care expenses, child fitness expenses, and attendant care expense receipts
- 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, retiring allowances or employment income
- Information on any business investment losses
- Schedule of purchase and sale of securities, commissions paid
- Monthly transit pass receipts