



# Green & Company

Professional Accountants

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Web: [www.greenandcompany.ca](http://www.greenandcompany.ca)



## Personal Income Tax Preparation: CHECKLIST

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Page 1 of 2

### **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