



Avoid delays in processing your tax return this season – Simply put a check beside each item you will be providing us with and leave it with reception.

Please Note: This List will be returned to you on Completion of your Taxes.  
Use it as a Guide for your Future Returns.

### GOVERNMENT SLIPS / DOCUMENTATION

- Notice of Assessment or Re-Assessment
- Installment Remittance Form
- T4 Slip(s) Number Included: \_\_\_\_\_
- T4A Slip(s) Number Included: \_\_\_\_\_
- T4E Slip(s) Number Included: \_\_\_\_\_
- T4A(P) Slip
- T4OAS Slip
- T4RIF Slip(s) Number Included: \_\_\_\_\_
- T5 Slip(s) Number Included: \_\_\_\_\_
- T3 Slip(s) (please see page 2) Number Included: \_\_\_\_\_
- T5007 Slip(s) Number Included: \_\_\_\_\_
- T5013 Slip(s) Number Included: \_\_\_\_\_
- T4RSP Slip(s) Number Included: \_\_\_\_\_
- RRSP Contribution Receipts Number Included: \_\_\_\_\_
- T2202 / T2202A Tuition Slip Number Included: \_\_\_\_\_

### RECEIPTS FOR GENERAL EXPENSES

- Interest on Student Loans
- Professional or Union Dues
- Property Taxes and/or Rent Paid
- Safety Deposit Box Fees or Other Carrying Charges / Loan Interest
- Spousal or Child Support Payments / Income
- Eligible Child Care Expenses Number Included: \_\_\_\_\_
- Charitable or Political Donations Number Included: \_\_\_\_\_  
*OR... See Attached Itemized List*
- Medical Expenses Number Included: \_\_\_\_\_  
*OR... See Attached Itemized List*
- Information Regarding Home Buyer's Plan or Life Long Learner's Plan  
Withdrawal or Payments (must include if you are a member)

**INCOME FROM A RENTAL PROPERTY**

- q** Address of your Rental Property and Number of Units
- q** Rent received per unit
- Please Include Receipts or Amounts of any:*
- q** Property Taxes Paid
- q** Utilities Paid
- q** Repairs and Maintenance Paid
- q** Renovation Costs
- q** UCC or Capital Cost Allowance
- q** Insurance Paid

**BUSINESS INCOME / FARMING / SELF-EMPLOYMENT INCOME /  
COMMISSION EXPENSES**

- q** List of Revenue and Expenses for the tax year (templates available on request)
- q** Asset Additions
- q** Business use of home (include portion of home that is used for business i.e.: office taking up entire basement = 1/3 of 3-story home)
- q** Business use of auto (include log book specifying personal km's vs. business km's driven)
- q** Form T2200 signed and filled out in full by employer (Declaration of Conditions of Employment)
- q** Auto Operating Costs
- q** Meals and Lodging Expense Form (TL2)

**INVESTMENT INCOME / SALE OF SHARES**

*If you sold any shares this tax year, please be sure to provide your tax preparer with a list that includes...*

- q** Date of sale of Shares
- q** Adjusted-Cost-Base (Original Cost of Shares)
- q** Selling Price of Shares
- q** Number of Shares Sold
- q** Type of Shares Sold, Including Company Name

**OTHER COMMENTS / QUESTIONS**

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