



Van Wensem, Eakins & George  
Certified General Accountants

## PERSONAL INCOME TAX RETURN GENERAL CHECKLIST GUIDE

PLEASE INCLUDE ALL INFORMATION SLIPS RECEIVED, INCLUDING BUT NOT RESTRICTED TO THE FOLLOWING.

THIS IS A GUIDE – Not all of these slips will apply to every situation.

**In addition to these slips, include any information you feel may be required in preparing your tax return.**

INCOME	DEDUCTIONS AND TAX CREDITS
<input type="checkbox"/> Employment income (T4)	<input type="checkbox"/> R.R.S.P. contributions made in the year plus within 60 days of the new year (official income tax receipts)
<input type="checkbox"/> Tips \$ _____	<input type="checkbox"/> Union, professional or like dues
<input type="checkbox"/> Other employment income (T4A)	<input type="checkbox"/> Childcare expense receipts, including camp and pre-school fees (receipts required)
<input type="checkbox"/> Pension and retirement income (T4A)	<input type="checkbox"/> Moving expenses (if moving at least 40 km closer to a <u>new</u> work or school location)
<input type="checkbox"/> Old Age Security - [T4A (OAS)]	<input type="checkbox"/> Deductible alimony paid: \$ _____
<input type="checkbox"/> Canada Pension [T4A(P)]	<input type="checkbox"/> Copy of agreement
<input type="checkbox"/> Registered retirement income fund (T4RIF)	<input type="checkbox"/> Cancelled cheques for alimony and child support paid
<input type="checkbox"/> Employment Insurance Benefits (T4E)	<input type="checkbox"/> Employment expenses: A declaration of condition of employment (T2200) MUST be signed by your employer, and submitted, if you are claiming employment expenses
<input type="checkbox"/> Interest or dividend income (T5/T600)	<input type="checkbox"/> Safety deposit box cost (if used to hold stocks, bonds, or other forms of investments) Amount \$ _____
<input type="checkbox"/> Trust, investment and mutual fund income (T3) (You may not receive these until April)	<input type="checkbox"/> Statement of interest paid on monies borrowed <u>for investment purposes</u>
<input type="checkbox"/> Interest income earned but not yet received \$ _____	<input type="checkbox"/> Investment counsel fees (outside of RRSPs)
<input type="checkbox"/> Limited Partnership (T5013)	<input type="checkbox"/> Student loan interest (official receipt only)
<input type="checkbox"/> Do you own rental property? We need all the details with regard to income and expenses. (See our website for form.)	<input type="checkbox"/> Tuition receipts for yourself (official receipt only)
<input type="checkbox"/> Did you buy or sell rental, investment or recreational property? If so, please provide details.	<input type="checkbox"/> Tuition transfers from child: Child to sign back of CRA T2202 authorizing transfer. Please include child's: Net income (Line 150) _____
<input type="checkbox"/> Did you sell shares or mutual funds (outside of RRSP's) If so, please provide a summary of capital gains and losses – see our website for form to use or request details from your investment advisor	<input type="checkbox"/> Non-refundable tax credits _____
<input type="checkbox"/> Child support/alimony received: Amount \$ _____ Date of written agreement _____	<input type="checkbox"/> Medical, prescription, dental and other medical receipts (excluding BC Medical payments) including payments made to a private plan. (Receipts required) (See forms on website.)
<input type="checkbox"/> R.R.S.P.'s cashed during the year (T4RSP)	<input type="checkbox"/> Charitable donations up to and including December 31st (Receipts required)
<input type="checkbox"/> Home Buyers Plan or Life Long Learning Plan RSP withdrawals	<input type="checkbox"/> Child Fitness Tax Credit Receipts
<input type="checkbox"/> Are you self-employed? We need all the details with regard to business or partnership income and expenses	
<input type="checkbox"/> W.C.B. benefits (T5007)	
<input type="checkbox"/> Universal Child Care Benefits Received (RC62)	

### EXAMPLES OF OTHER INFORMATION WHICH MAY BE APPLICABLE TO YOUR TAX RETURN

<input type="checkbox"/> Political contribution receipts	<input type="checkbox"/> Details regarding RRSP Home Buyers Plan or Lifelong Learning Plan withdrawals or repayment
<input type="checkbox"/> Personal tax installment payments made for the year \$ _____	<input type="checkbox"/> If you provided in-home care for a parent or grandparent (including in-laws) 65 years of age or over, or an infirm dependent relative, a tax credit may be available. Also, the caregiver may claim related training costs as a medical expense credit.
<input type="checkbox"/> Copy of last years tax return (if new to our firm this year)	<input type="checkbox"/> Are you a citizen or resident of any other country?
<input type="checkbox"/> Previous year's income tax assessment notice received from Canada Revenue Agency	<input type="checkbox"/> If you or a dependent is disabled, provide Form T2201 Disability Tax Credit Certificate, to claim a tax credit
<input type="checkbox"/> Pension Adjustment Reversal (T10 Slip)	
<input type="checkbox"/> Any other correspondence from CRA	

**VAN WENSEM, EAKINS & GEORGE, CGAs**

17678 – 58A Avenue, SURREY, B.C. V3S 8V7 TEL: 604-576-9242 FAX: 604-576-9258 WEBSITE: www.vweg-cga.com