

2013 PERSONAL TAX RETURN CHECKLIST



- 1. If this is the first year we have prepared your return, please try to provide a copy of your returns and assessments for the last two years.
- 2. Note any changes to personal information including address, dependent, and marriage status.
- 3. Copy of your 2012 tax assessment notice.
- 4. T4 and T4A slip(s) supporting employment salary, commission, and other income.
- 5. Commission salespersons i) statement of allowable expenses and ii) completed and signed form T2200.
- 6. T4A(P) and other slips supporting pension, superannuation, C.P.P., O.A.S., Workers Compensation, and social assistance income and benefits. C.P.P. and O.A.S. slips are usually mailed together.
- 7. T4U slips re: employment insurance benefits.
- 8. T3 and T5 slips re: interest, dividend and other investment income received.
- 9. Statement of rental income and expenses.
- 10. Statement or schedules supporting or summarizing business and professional income and expenses.
- 11. T5013 slips supporting income or loss from limited partnerships as well as Canadian Exploration Expenses.
- 12. Details of alimony or support received or paid, including amount, payor, and social insurance numbers.
- 13. Information supporting the sale of investments. The original cost of capital property and the proceeds and date of disposal should be documented. Annual summaries detailing your mutual fund transactions should also be forwarded as well as details regarding the purchase and sale of T-bills.
- 14. Receipts supporting:
 - registered retirement savings plan premiums (RRSP)
 - union and professional dues
 - child care expenses including the name and S.I.N. of any individuals paid
 - moving expenses
 - medical expenses, private health plan premiums paid, and attendant care expense
 - donations made
- 15. Documentation supporting investment interest charges.
- 16. Documents supporting accounting, investment and management fees.
- 17. Income (if any) earned by dependants should be noted.
- 18. Form T2202 or T2202A supporting the education deduction and tuition fees paid by you or your dependant.
- 19. Receipt from National Student Loans Service Centre supporting interest paid on student loans during the year.
- 20. Rent paid or property taxes paid for Ontario tax credit purposes.
- 21. Information slips supporting any tax installments made on account of 2013 taxes.
- 22. If you are self-employed, private health care premiums paid during the year.
- 23. Detail the cost of foreign property if its cost exceeds \$ 100,000 and it earns rental income.
- 24. Public transit weekly or monthly passes or receipts supporting their purchase.
- 25. Receipts in support of fees paid to qualifying sports programs and arts programs for children under 16.
- 26. RC62 slip supporting Universal Child Care Benefit received.