

**the tax pros**

**INCOME TAX SERVICE**

# Tax Checklist

To ensure you receive all eligible credits and deductions on your tax return, check off all items below applicable to you and your spouse. If you are unsure, check it off and we will follow up with you.

## Income

- Employment Income (T4)
- EI, CERB, CRB, CRSB &/or CRCB (T4E, T4A)
- Old Age Security & CPP (T4A-OAS, T4AP)
- Grants, Scholarships, Bursaries, Awards (T4A)
- Other Pensions &/or Annuities (T4A)
- RRSP, RIF Withdrawals (T4RSP, T4RIF)
- Interest, Dividends &/or Mutual funds (T3, T5)
- Other Investments (T5008, T5013)
- Social Assistance, PWD or WCB (T5007)
- Spousal Support Received
- Foreign Income
- Rental Property Income (Checklist)
- Self Employment Income (Checklist)
- Delivery Driver Income (Checklist)
- Other not listed \_\_\_\_\_

## Other Information

- Sale of Principal Residence
- Home Buyer or Lifelong Learning Plan
- Instalments
- Void Cheque or Direct Deposit form if you'd like to set up or update with CRA.
- Other not listed \_\_\_\_\_

## Deductions, Credits & Expenses

- RRSP Contributions
- Tuition & Exam Fees (T2202)
- Interest Paid on Student Loans
- Professional Fees or Union Dues
- Charitable & Political Donations
- Medical Expenses
- Child Care Expenses
- Employment Expenses (T2200 & Checklist)
- Trade Tool Deduction (T2200 & signed tool list)
- Trade Training Tax Credit
- Meals & Lodging Transport Employees (TL2)
- Eligible Educator School Supply Tax Credit
- Spousal & Child Support Paid
- Moving Expenses
- First Time Home Buyer Tax Credit
- Disability Tax Credit
- Home Accessibility Tax Credit
- Northern Resident Deduction
- Investment Fees & Loan Interest
- Digital News Subscription Expense
- Volunteer Firefighter or Search & Rescue
- Other not listed \_\_\_\_\_

## The Tax Pros Income Tax Service

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