



Personal Income Tax Return Checklist

We are your personal and corporate tax return specialists.
Let us help you maximize your refund.

slips

- All T4 slips
- All other information slips (T3, T5, T4A, etc.)
- Old Age Security and CPP benefits
- Other pensions and annuities
- Employment Insurance benefits
- Social assistance payments
- Workers' Compensation benefits
- Universal Child Care benefits

other income

- Other employment income (including stock option plans)
- Business income
- Partnership income
- Rental income
- Alimony, separation allowances, child maintenance
- Pensions
- Director fees
- Scholarships, fellowships, and bursaries

expenses

- Employment related expenses – provide form T2200 “Declaration of Conditions of Employment”
- Interest on money borrowed to purchase investments
- Investment counsel fees
- Business and employment purchases like vehicles, supplies, etc.
- Moving expenses – including costs of maintaining a vacant former residence
- Child care expenses
- Alimony, separation allowances, child maintenance
- Safety deposit box fees
- Accounting fees
- Pension plan contributions

details and receipts

- Registered Retirement Savings Plan (RRSP) contributions
- Professional dues
- Tuition fees – Forms T2202, TL11A, TL11D
- Charitable donations
- Capital gains and losses realized (including actual date of disposition)
- Medical expenses (including medical-related modifications to new or existing homes and travel expenses)
- Political contributions
- Eligible fitness expenses
- Adoption expenses
- Amount paid for monthly public transit
- Interest paid on qualifying student loans is eligible for a tax credit

rrsp plans

- Home Buyers' Plan withdrawals
- Lifelong Learning Plan repayment

dependants & caregiving

If one of your dependant was in full time attendance at a college or university:

- Details concerning name of institution, number of months in attendance, tuition fees, income of dependent, Form T2202

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 federal tax credit is available. Also, the caregiver may claim related training costs as a medical expense credit.

foreign income and property

- Details of income from, or distributions to, foreign entities such as foreign affiliates and trusts
- Details of foreign property owned at any time including cash, stocks, trusts, partnerships, real estate, etc.

lethbridge: 403-382-6800

taber: 403-223-0056

fort macleod: 403-553-3355

clareholm: 403-625-4448

pincher creek: 403-627-5510

vauxhall: 403-654-4060

milk river: 403-647-3662

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