

MERCER & MERCER

CHARTERED PROFESSIONAL ACCOUNTANTS • PROFESSIONAL CORPORATION
• LICENSED PUBLIC ACCOUNTANTS •

PERSONAL INCOME TAX PREPARATION CHECKLIST

Please print this checklist to help ensure you bring the correct documentation with you to your appointment.

We must have the proper substantiating documents to complete your personal income tax return.

- Are you a Canadian Citizen
- Do you authorize your name being given to Elections Canada
- Did you own or hold foreign property or investments with a total value of more than CAN \$100,000

General

All T-slips: T4, T4A, T4U, T5, T3, T4AP, OAS, RIF, T5007, T5013

- | | |
|---|---|
| <input type="checkbox"/> Family Information: names, birthdates, SIN | <input type="checkbox"/> Interest paid on student loans |
| <input type="checkbox"/> Personal Changes: birth/death/marital status | <input type="checkbox"/> Carrying charges/loan interest |
| <input type="checkbox"/> Notice of Assessment | <input type="checkbox"/> Moving expenses |
| <input type="checkbox"/> RRSP contribution slips | <input type="checkbox"/> Childcare expenses |
| <input type="checkbox"/> Capital gains & losses, w/Annual Gains & Loss Report | <input type="checkbox"/> Fitness & Arts Credits proper receipts |
| <input type="checkbox"/> Fees/Interest paid on investments | <input type="checkbox"/> Public Transit proper receipts |
| <input type="checkbox"/> Homebuyer Plan required payment | <input type="checkbox"/> Property Taxes/Rent paid & to whom |
| <input type="checkbox"/> Union & Professional Dues | <input type="checkbox"/> Political contribution receipts |
| <input type="checkbox"/> Medical/dental/LTC/private insurance | <input type="checkbox"/> Tax Instalments paid through the year |
| <input type="checkbox"/> Donations to a CRA Registered Charity | <input type="checkbox"/> Spousal support income/payments |
| <input type="checkbox"/> T2202 Disability Tax Credit | <input type="checkbox"/> Separation Agreement |
| <input type="checkbox"/> T2202A Tuition/Education amount | <input type="checkbox"/> Power of Attorney |

Employment Commissions

- | | |
|--|--|
| <input type="checkbox"/> T2200 from employer | <input type="checkbox"/> Commission expenses |
|--|--|

Rental Property

- | | |
|--|--|
| <input type="checkbox"/> address and number of units | <input type="checkbox"/> utilities and insurance |
| <input type="checkbox"/> total rent income per unit | <input type="checkbox"/> repairs & maintenance |
| <input type="checkbox"/> mortgage interest | <input type="checkbox"/> other rental expenses |
| <input type="checkbox"/> property taxes paid | |

Income from a Business or Self-Employment

- | | |
|--|--|
| <input type="checkbox"/> Revenue and expenses for the year | <input type="checkbox"/> Bank loans and interest charges |
| <input type="checkbox"/> Capital Asset additions | <input type="checkbox"/> Automobile expenses/business kilometers |
| <input type="checkbox"/> Business use of home expenses | <input type="checkbox"/> Truckers (TL2) |