

Personal Income Tax Checklist

This checklist is meant as a guide to assist you in assembling your information, therefore it only includes common tax items. If you have other items that are not included on this sheet and you are not sure if there are tax implications, please feel free to contact our office at any time and one of our staff members would be happy to assist you and answer your questions.

Please note that Canada Revenue Agency performs regular reviews of income tax returns. If your return is selected for review, you will be required to provide documentation to support amounts reported. As a result, we want to reinforce the importance of providing our office with complete information and to remind you to keep all your tax receipts and records for a period of 6 years.

If you require additional copies of this checklist, it is available in the "Client Resources" section of our website at www.ddwca.com.

INCOME		PROVIDE	DEDUCTIONS		PROVIDE
<i>(check all that apply)</i>					
<input type="checkbox"/>	Employment or commission income	T4 or T4A	<input type="checkbox"/>	RRSP contributions	Tax Receipts
<input type="checkbox"/>	Pension and other income	T4A	<input type="checkbox"/>	Union, professional dues	Tax Receipts
<input type="checkbox"/>	Scholarships or bursaries	T4A	<input type="checkbox"/>	Safety deposit box charges	Record of amounts paid
<input type="checkbox"/>	Old Age Security	T4A(OAS)	<input type="checkbox"/>	Interest on funds borrowed for investing	Record of amounts paid
<input type="checkbox"/>	CPP Benefits	T4A(P)	<input type="checkbox"/>	Investment counsel and accounting fees	Record of amounts paid
<input type="checkbox"/>	Employment insurance benefits	T4E	<input type="checkbox"/>	Employment or commission expenses	T2200 & Summary and/or Receipts**
<input type="checkbox"/>	Social Assistance/WCB	T5007	<input type="checkbox"/>	Child care expenses	Summary and/or Receipts
<input type="checkbox"/>	Contract payments	T5018	<input type="checkbox"/>	Moving expenses	Summary and/or Receipts
<input type="checkbox"/>	RRSP income/withdrawals	T4 RSP			
<input type="checkbox"/>	RRIF income/withdrawals	T4 RIF	<input type="checkbox"/>	OTHER _____	\$ _____
<input type="checkbox"/>	Universal Child Care Benefit	RC 62	<input type="checkbox"/>	OTHER _____	\$ _____
<input type="checkbox"/>	Interest and dividend income	T3 or T5	Examples of other deductions include support payments, legal expenses incurred to collect income, and any other items not noted above.		
<input type="checkbox"/>	Statement of security transactions	T5008	** Worksheets to assist you in summarizing the information are available on our website at www.ddwca.com .		
<input type="checkbox"/>	Limited partnership income	T5013	TAX CREDITS		
<input type="checkbox"/>	Self-employment income	Summary and/or Receipts**	<i>(check all that apply)</i>		
<input type="checkbox"/>	Rental income	Summary and/or Receipts**	<input type="checkbox"/>	Disability amount	T2201
<input type="checkbox"/>	Capital gains/losses	Summary and/or sale documentation**	<input type="checkbox"/>	Amount for children	Details of dependants
<input type="checkbox"/>	Foreign income	Details and/or other tax receipts	<input type="checkbox"/>	Tuition fees/education credit	T2202 or other tax receipts
<input type="checkbox"/>	OTHER _____	\$ _____	<input type="checkbox"/>	Interest paid on student loans	Record of amounts paid
<input type="checkbox"/>	OTHER _____	\$ _____	<input type="checkbox"/>	Medical expenses	Summary and/or Receipts
Examples of other income include support payments, income not reported on slips (tips and/or odd jobs), and any other items not noted above.			<input type="checkbox"/>	Attendant care expenses	Record of amounts paid
** Worksheets to assist you in summarizing the information are available on our website at www.ddwca.com .			<input type="checkbox"/>	Charitable donation receipts	Tax Receipts
OTHER INFORMATION			<input type="checkbox"/>	Political contribution receipts	Tax Receipts
<i>(check all that apply)</i>			<input type="checkbox"/>	First Time Home Buyer credit	Details of new home purchase
<input type="checkbox"/>	Income tax instalments paid during year		<input type="checkbox"/>	Public transit passes	Summary and/or Receipts
<input type="checkbox"/>	Prior year notices of assessment and reassessment		<input type="checkbox"/>	Children fitness credit	Summary and/or Receipts
<input type="checkbox"/>	Prior year tax return (if you are a new client)		<input type="checkbox"/>	Children's arts credit	Summary and/or Receipts
<input type="checkbox"/>	Details of Home Buyer Plan or Lifelong Learning Plan withdrawals or repayments during year		<input type="checkbox"/>	OTHER _____	\$ _____
<input type="checkbox"/>	OTHER _____		<input type="checkbox"/>	OTHER _____	\$ _____
<input type="checkbox"/>	OTHER _____		Examples of other credits include adoption expenses, taxes paid to other countries and any other items not noted above.		
Any other information that you feel will assist our office with preparing your return.			Thank You!		