

TAX PREPARATION CHECKLIST

✓	✓
<u>Employment</u>	<u>Retirement</u>
T4's, T4A's, T4E's, T5007's ☐	T4A's, T4A(OAS)'s, T4A(P)'s, T4RIF's, T4RSP ☐
Employment Expenses, Union Dues ☐	Property Taxes, Medical Payments, Donations ☐
RRSP Receipts ☐	Disability Credits, Trillium Benefits ☐
<u>Investment</u>	<u>Rentals</u>
T3's, T5's, T5008's, T5013's, T4PS ☐	Totals for Rent, Property Taxes, Condo Fees, Utilities ☐
Principle Residence Exemption PRE ☐	Maintenance & Repairs, Interest Expense, Insurance ☐
Capital Gains & Capital Losses ☐	Property Management, Advertising, Legal, Etc. ☐
Investment Counsel Fees ☐	
Foreign Income, T1135's ☐	<u>Business Income</u>
Partnership Income ☐	Total's for Auto & Home Office Expenses ☐
Interest & Carrying Charges ☐	Totals for Supplies, Licenses, Meals, CCA ☐
<u>Other Deductions & Credits</u>	<u>Other Items</u>
Tuition, T2200's, T111A's, ☐	Tax Returns for Deceased Taxpayers ☐
Childcare, Alimony & UCCB (RC62) ☐	Previous Year Tax Returns ☐
Installment Payments ☐	HST Returns ☐