

INCOME

Personal

- T4, T4A – Salaries and Employment Income
- Other Employment Benefits
- T4A (P) – Canada Pension Plan Benefits
- T4A (OAS) – Old Age Security Benefits
- T4A – Other Pensions or Superannuation
- T4RSP – RRSP Income
- T4RIF – RRIF Income
- T4E – Employment Insurance Benefits
- T5007 – WCB Benefits / Social Services Benefits
- T4RCA – Retirement Income

Other

- Spousal Support Received
- Scholarships / Bursaries
- Other income – Please specify

Investments

- T3 – Trust Fund Income
- T4PS, T5 – Interest and Dividend
- T5008 – Statement of Security Transactions
- Interest on Tax Refunds (from Notice of Assessment)
- Foreign Income
- Annuities
- Rental Income (see Worksheet at www.eprcpa.ca)
- Annual Tax Reporting Package from your Broker
- T5013 – Limited Partnership Income (Loss)
- Capital Gains / Losses (Full Details Required)
- Sales documents on sale of principal residence

Business

- Self – Employment Income & Expense Information
- Vehicle expense and use information (KM's used)
- Office in Home information
- GST Return for Self Employed individuals

DEDUCTIONS & CREDITS

Non – Refundable Credits

- Married Amount – Spouses Net Income \$ _____
- Equivalent to Married Amount (Full Details Required)
- Disability Deductions
- T2202 - Tuition Fees / Education Credit for Dependant
- TL11 Tuition / Education Credit for Foreign Schools
- Dependant Student Net Income \$ _____
- Interest Paid on Student Loans
- Medical Receipts and Attendant Care Expenses
- Charitable & Political Donations
- First Time Home Buyers Credit
- Volunteer Firefighter Amount
- Search & Rescue Volunteer
- Eligible Teacher & ECE Eligible Supplies
- Adoption Expenses

Other Deductions

- RRSP Deductions
- Union / Professional Dues
- Spousal Support Paid
- Interest and Carrying Charges on Investments
- Investment Management & Advisor Fees
- Employment Expenses (Full Details Required)
- Deductible Legal Fees
- Child Care Expenses (Receipts Required)
- Moving Expenses (Full Details Required)
- TL2 – Claim for Board and Lodging

OTHER ITEMS

- Loss Carry Forwards (Capital/Non-capital/Farming)
- Allowable Business Investment Loss
- Dependant Information
- T2200 – Declaration of Conditions of Employment (signed by Employer)
- Prior year Notice of Assessment
- Instalment Payments for current year
- T1135 Foreign Property Details (CDN \$100,000) (detailed form required)

IMPORTANT QUESTIONS FOR ELIGIBILITY OF TAX CREDITS:

1. a. How many individuals live in your home, what are their dates of birth and relationship to you?
b. Has there been any change to the number or status of any members in your household?
2. a. Who do you support financially? Do you make support payments?
b. Did you pay for an attendant, childcare provider or any retirement or nursing home costs?
3. Do you or any dependent living with you have a mental or physical infirmity or disability?
4. Did your marital status change during the year?
5. Did anyone in your family arrive in or leave Canada?
6. Did anyone in your family pay for medical expenses this year, other than MSP? (MSP is not deductible)
7. Did anyone in your family attend a post secondary institution, part time or full time?
8. Did anyone in your family pay **private** extended health or dental premiums?
9. Did anyone in your family make donations or gifts to charities?