

# CHARLES JEFFERY

## Chartered Accountant

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## PERSONAL INCOME TAX ORGANIZER

### CHECK LIST

- T3 Slips (*statement of trust income*)
- T4 Slips (*employment income*)
- T4A (*pension, annuity or other income*)
- T4A (P) (*CPP benefits income*)
- T4RF (*proceeds to RRIF*)
- T4RSP (*proceeds to RRSP*)
- T4U (*proceeds for EI benefits*)
- T5 (*interest or taxable dividends*)
- T600 (*bond interest coupons cashed at bank*)
- T5008 (*investment income & securities transactions*)
- T101A (*resource expense [flow-through shares]*)
- T-BD (2) (*statement of disposition of debt obligation in bearer form*)
- T2200 (*declaration of conditions of employment*)
- T5013 (*Statement of Partnership income*)
- TL2 (*board and lodging expense*)
- Interest Expense (*details on loans for business or investment purposes*)
- Investment expenses (*safety deposit box, investment advice, etc.*)
- Tax Shelter Financial Statements
- Rental Properties (*list of expenses [ie. Insurance, taxes, maintenance, utilities] and rental income*)
- Capital Gains (*purchase and sale slips for any securities sold in the year, details of property sold*)
- RRSP Contribution Receipts
- Union or Professional Dues
- Student Tuition Receipts
- Medical Receipts
- Charitable Donation Receipts
- Political Contribution Receipts
- Child Care Receipts
- Child Fitness Credit Receipts
- Home renovation Expenses
- Prior Year Notice of Assessment form Canada Revenue Agency
- Employment Expense information (*meals, entertainment, home office, equipment not supplied by your employer, vehicle expense and log book*)
- Self Employment Information (*revenue and expenses*)
- Home Business Information (*revenue and expenses*)
- Northern Resident Expenses (*airline tickets, other expenses, name of travellers, length of residency in the NWT*)
- Moving Expenses (*hotels, meals, shipping, travel*)
- Spouse Income and list of dependents and their income
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