



It is a requirement of Canada Revenue Agency that the tax preparer reviews all information submitted on the taxpayer's return. Therefore it is very important that all information slips are included in the paperwork provided to us. **If the slip is not provided the deduction can not be used.** Because of recent rulings please understand we MUST adhere to this policy.

Checklist of items to include:

- Signed E-file authorization form T-183, Consent Form T1013 and/or Split Pension Income form T1032 – available at the MMI office
- CRA Tax Notice of Assessment or Reassessment– not your property tax assessment
- RRSP limit. This is found on your notice of assessment.
- Authorize CRA to provide information to Elections Canada? We will presume YES, unless told otherwise
- Address changes, additional dependent's name and date of birth, auto deposit bank changes, etc.

Income information

- T4 employment earnings
- T2200 employment conditions if claiming employment expenses
- T4A commission, pension, retiring allowances, lump sum payments, annuities
- RC62 UCCB- universal child care benefit payments/
- T4 (OAS) Old Age Security
- T4A (P) Canada / Quebec Pension Plan
- T4E employment insurance
- T4RSP/RIF withdrawals, annuities
- T3 trust or estate income, mutual fund income - many investments earn capital gains or dividends within the fund- T3s don't have to be issued until March 31/11 for 2010 income.
- T5 / T4PS interest or dividends paid / income from profit sharing plan
- T5008 **CAPITAL GAINS / LOSSES** Sale of stocks, bonds, mutual funds, property or other investments. *Not all gains/losses are reported on T-slips.* In fact, T3 slips only include trading by the fund and NOT by the individual taxpayer. **Please provide our office with your year end statements for all non-registered investments.** We DO NOT need RRSP or RRIF investment summaries. Have you sold any of your investments in past years that you haven't claimed gains/losses for? It may be necessary to request an adjustment to prior years' tax returns. *If you are unsure if you are affected by capital gains/losses, contact your financial advisor.* It would be beneficial to create a listing of all investments held.
- Rental property income and expenses
 - If new property, purchase details
 - If property sold, selling details
- Self-employment / commission sales income and expenses
 - Automobile information, including make, model of car, mileage total, business usage, summary of receipts (we can add them up, but it takes time). If new vehicle, details on sale of old & purchase of new.
 - Office-in-home expenses including measurements of space used to total house area, summary of house expenses
 - Download from our website or ask us to fax or e-mail to you the form we use to organize auto and house info.
- Support payments received
- Workers' Compensation
- Social Benefits
- Other information slips

Deductions and credits – must have receipts/statements to prove (in some cases canceled cheques are sufficient)

- RRSP contributions and HBP/LLP information
- Union or professional dues
- Interest / carrying charges - do you have loans for investment purposes? (please make a list)
- Safety deposit box / accounting fees
- Employment expenses (remember the T2200)
 - Automobile expenses and/ or Office-in-home expenses
 - Download from our website or ask us to fax or e-mail to you the form we use to organize auto and house info.
- Support payments paid
- Moving expenses
- Child care receipts
- Children's fitness receipts
- Tuition receipts – if claiming transfer from child, we also require information on the child's income & tax credits. Student must sign the T2202A in the appropriate box. PLEASE make sure the form is signed before you bring in the information.
- Student loan interest (students only)
- Medical / dental / eye care receipts – including any premiums paid into a health plan. Drug stores might provide a summary.
- Donation receipts
- Political contributions
- Provincial/Federal tax credits – including labour sponsored ventures
- Overseas Employment Tax credit certificate
- Equity tax credit certificate
- Other receipts including public transit amounts and tax installments paid statements