

To help you assemble your financial information for preparation of your income tax return, keep this checklist handy. The checklist should be completed and returned to us together with the financial information assembled.

Personal Tax Checklist 2008

- ✓ **Copy of last year's Notice of Assessment from Canada Revenue Agency**
- ✓ **Employment Income:**
 - T4
 - T4PS
 - T4A
- ✓ **Pension Income:**
 - T4A OAS
 - T4AP
 - T4A
 - T4RSP
 - T4RSP
 - T4RIF
- ✓ **Employment Expenses**
 - T2200 plus a list of the related expenses
- ✓ **Investment Income**
 - T3
 - T5
 - T5008
 - T5013
- ✓ **Capital Gains**
 - T5013
 - Trading Summaries from Brokers
 - Annual statements from Mutual funds
- ✓ **Deductions and Credits**
 - RRSP (must be official receipts)
 - Investment advise and accounting fees paid
 - Interest on investment loans
 - Safety deposit box fees
 - Tuition fees – T2202/2202A
 - Union/Professional dues
 - Support payment information
 - Child care receipts
 - Child Fitness tax credit receipts
 - Donations (must be official forms)
 - Installment payment information
 - Medical/Dental/Optical receipts (less any reimbursements from Insurance)
 - Premiums paid to Private Medical Insurance Plans
 - Student Loan interest slips
- ✓ **Other Income**
 - Rental Income and expense information
 - Self Employment information