



INCOME TAX PREPARATION CHECKLIST

Eby's Business Services Ltd
Phone: 250-339-2261
Fax: 250-339-5855
Email: taxes@ebys.com

Use this checklist to make sure you have all your receipts and income records when you come and see us so we can ensure we minimize your taxes and you receive the maximum refund!

TAX SLIPS

- Mutual funds, REITS, ETFs (T3)
- Employment income (T4)
- Certain scholarships (T4A)*
- Other pensions & annuities (T4A)
- EI Benefits (T4E)
- Old Age Security benefits (T4A-OAS)
- CPP benefits (T4AP)
- RRSP income (T4 RSP)
- RRIF income (T4 RIF)
- Investment income - interest, dividends, certain capital gains (T5)
- Worker's compensation benefits and/or social assistance payment (T5007)
- Partnership income (T5013)
- Conditions of employment/allowable employment expenses (T2200)
- Tuition (T2202A)
- Exploration and development expenses (T101)

RECEIPTS

- RRSP contribution slips
- Child support/alimony payments or receipts
- Medical expenses
- Professional or union dues
- Charitable donation receipts
- Political contribution receipts
- Interest paid on student loans
- Carrying charge and interest expenses
- Child care expenses
- Children's fitness and arts receipts
- Adoption expenses
- Moving expenses (including realtor's commissions)
- Office-in-home expenses
- Tool expenses (tradespersons)
- Exams for professional certification
- Attendant expenses for a disabled person

OTHER DOCUMENTATION / INFORMATION

- Amounts you have paid in tax instalments
- Last year's notice of assessment/reassessment
- Canada Revenue Agency correspondence
- Other carry-forwards (for example, use-of-home expenses)
- Capital gains and losses information for stocks, bonds, real-estate, etc.
- Disability tax credit certificate
- Rental income & expenses
- Have you sold a house?
- Small business income & expenses
- Commissioned employee expenses
- Vehicle logbook (self-employed people & commissioned employees)
- Volunteer firefighter's certificate
- Northern residents deductions
- Legal expenses to collect alimony, pension or retiring allowances
- Business investment loss

MOVED? MARITAL STATUS CHANGED? NEW ADDITION TO FAMILY?

Please PRINT your updated address, phone number, marital status or if there are any new additions to your immediate family below.

FIRST NAME: _____ LAST NAME: _____

SPOUSE: _____ LAST NAME: _____

ADDRESS: _____

PHONE: _____ CELL: _____

EMAIL: _____

*Bring a VOIDED cheque or bank information for direct deposit or if your direct deposit has changed

NOTES:
