

Tax & Accounting Services

Phone: 604 595 4100

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Personal Income Tax Checklist

Use this checklist to assist you in gathering required information for us to prepare your personal income tax return

Deductions and Tax Credit	
Type of Deduction/ Tax Credit	Documentation/Information required
RRSP Contribution	Office receipt
Professional and/or union dues	Receipts.
Charitable donations	Receipts.
Medical, dental, eyeglass expenses	Receipts for nay twelwv month period (not previously claimed)
Educational deductions	Form T2202
Tuition fee / Student loan interest	Receipts.
Child care expenses	Name,address and social insurance number of person paid as well as amounts paid
Unemployment insurance repayment	Details
Moving expenses	Details of expenses as well as complete address for old and new location.
Commission expenses	Details of expenses as well as Form T2200 (Signed by employer)
Alimony/child expenses	Name and address of payee as well as as amount
Interest and carrying charges	Details
Safety deposit box	Amount paid
Disability deduction	Form T2201
Employment expenses	Original employment expenses and Declaration (T2200)
B.C.tax credit	Political donation
Losses during the year	Details

Other Information	
Type	Documentation/Information required
intallment payments	Latest installment notice received from Revenue Canada
Losses from previous years	Details,(previous years tax return should contain a carry forward schedule)
Prior years assessments	Assessment/reassessment notice
Refund for taxation year	Notice attached to Revenue Canada cheque

Should you experience any problems in gathering any of the above information, please contact our office. We look forward to seeing you during the income tax season.

Important

Phone today to book your appointment
Appointments book up quickly.

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