



# OLAFSON & JONES

## Personal Income Tax Checklist

### PERSONAL INCOME SLIPS

Please review the checklist below to ensure all applicable documents are submitted

	<b>T4</b> - All Statement of Income
	<b>T4A</b> - Pension, Retirement, annuity and other income
	<b>T3</b> - Statement of Trust Income
	<b>T5</b> - Statement of Investment Income
	<b>T4AP</b> - Statement of CPP Benefits
	<b>T4A(OAS)</b> , - Old Age Security Pension
	<b>T5008</b> - Statement of Securities Transactions
	<b>T5013</b> - Statement of Partnership Income
	<b>T5007</b> - Social Assistance Payment

	<b>T4RSP</b> - Statement of RRSP Income
	<b>T4RIF</b> - Statement of Income from a Registered Retirement Income Fund
	<b>T4E</b> - Statement of Employment Insurance Benefits
	<b>T4AP</b> - Statement of CPP Benefits
	Any foreign income/pension
	Rental Property Income, expenses, purchases & sales
	Capital Gain/losses schedule
	Other income _____

### RECEIPTS & TAX CREDITS

	Charitable donations
	Child care expenses
	Children's fitness programs
	Medical expenses
	Political contributions
	Professional and/or Union dues
	Investment Expenses (Interest, Fees, etc.)
	Tool expenses (apprentice, mechanics and tradesperson)
	Moving expenses <b>must be greater than 40km</b> Please provide all receipts and indicate distance moved and for what purpose
	If you are claiming home office indicate: Area used for work purposes _____ Sq ft

	Home Buyer's tax credit
	Disability Tax Credit Certificate
	Declaration of Conditions of Employment (Form T2200)
	Custody Arrangement and Copy of Agreement/ Support Payments Documentation
	Tuition and Enrolment Certificate (Form T2202/ T2202A)
	Vehicle/Travel Logbooks and Expenses
	If you are a teacher, indicate the amount spent on school supplies in the year \$_____
	Rent <b>*only one person per household can claim</b>
	Adoption expenses and receipts
	Other _____

Notes: \_\_\_\_\_