



TAX PREPARATION CHECKLIST

Liberty Tax™ has compiled this list of income tax forms, receipts, and documentation to bring with you for your visit.

SLIPS

- All T4 slips
- Other information slips:
 - T3, T5, T4E, T4A, T4AP, T4RSP, T4RIF
- CPP benefits
- Employment income
- Employment insurance benefits
- Old Age Security benefits
- Pensions and annuities
- Social assistance payments
- Workers' compensation benefits

ADDITIONAL DOCUMENTATION

- Automobile/Travel Logbooks
- Business, farm, or fishing income and expense records
- Canada Revenue Agency correspondence
- Capital gains/losses records
- Declaration of Conditions of Employment (T2200)
- Disability Tax Credit Certificate (T2201)
- Northern residents deductions
- Notice of Assessment
- Rental income & expense record

RECEIPTS

- Adoption expenses
- Carrying charges and interest expenses
- Charitable donations
- Childcare expenses
- Children's fitness programs
- Interest and dividend payments
- Medical expenses
- Moving costs
- Office-in-home expenses
- Political contributions
- Professional fees
- RRSP contributions
- Sale or deemed sale of stocks, bonds or real estate
- Student loan interest payments
- Support for a child, spouse, or common-law partner
- Tool expenses (tradespersons)
- Travel expenses
- Tuition/Education amounts
(For qualifying students)
- Union dues
- Vehicle expenses