

Not Sure What You Need To Bring In To File Your Tax Return?

Use our Tax Checklist to ensure you have everything such as T4 and T5 slips, receipts, and a copy of last year's return for reference when you come in to our office to file your return.

Document Checklist	Self	Spouse	Document Checklist	Self	Spouse
Apprentice Job Creation Tax Credit · The AJCTC is a non-refundable tax credit equal to 10% of the eligible salaries and wages payable to eligible apprentices in respect of employment after May 1, 2006. The maximum credit an employer can claim is \$2,000 per year for each eligible apprentice. If your business hires an eligible apprentice, you qualify to claim the credit.	<input type="checkbox"/>	<input type="checkbox"/>	Property & Rent · Total paid or receipts or canceled cheques for rent or municipal taxes including the name of the municipality or landlord and address. · Social Assistance & Workers Compensation payments (form T5007) received.	<input type="checkbox"/>	<input type="checkbox"/>
Registered Pension Plan · Receipts for contributions (normally on T4).	<input type="checkbox"/>	<input type="checkbox"/>	Prior Year Assessment Notice · Notice of Assessment from CRA.	<input type="checkbox"/>	<input type="checkbox"/>
Registered Retirement Savings Plans · Receipts for contributions made up to 60 days after the year end.	<input type="checkbox"/>	<input type="checkbox"/>	Marital Status · Details of change in marital status (including common law).	<input type="checkbox"/>	<input type="checkbox"/>
Tuition Fees and Education Certificate · Form T2202A or TL11A from the Canadian or foreign institution attended for self, spouse or child.	<input type="checkbox"/>	<input type="checkbox"/>	Filing Status · U.S. citizen, or residents of another country?	<input type="checkbox"/>	<input type="checkbox"/>
Interest Expense for Business or Investment Purposes · Purpose of the loan, whether you still own the asset purchased with borrowed funds, how much interest you paid.	<input type="checkbox"/>	<input type="checkbox"/>	Personal Credits · Details of income of spouse, dependents.	<input type="checkbox"/>	<input type="checkbox"/>
Moving Expenses (40 km closer to work or school) · Summary or receipts for expenses including meals and lodgings, moving company or truck rentals, board and lodging, costs for canceling an unexpired lease or selling your old home.	<input type="checkbox"/>	<input type="checkbox"/>	New Dependants · Names and birth dates of new dependents.	<input type="checkbox"/>	<input type="checkbox"/>
Child Care · Receipts from the person, school or camp should include name, address and SIN or business number of the recipients.	<input type="checkbox"/>	<input type="checkbox"/>	Disability · Details of disability for self, dependants. · T2201 - Disability credit form certified by a doctor.	<input type="checkbox"/>	<input type="checkbox"/>
Alimony or Maintenance · For income: total amount received in the year.	<input type="checkbox"/>	<input type="checkbox"/>	Foreign Property · Description and cost of all foreign property owned.	<input type="checkbox"/>	<input type="checkbox"/>
Spousal Support (Child Support) · Any agreements made after May 1, 1997 are not deductible.	<input type="checkbox"/>	<input type="checkbox"/>	Foreign Income · Details and related slips.	<input type="checkbox"/>	<input type="checkbox"/>
Accounting Fees, Legal Fees Investment Counsel Fees and Safety Deposit Box Rentals · Summary or invoices for amounts paid or incurred in the year, (for self-employment, fiscal years; for investments, rentals or other income, calendar years). · You can deduct any legal fees you paid in the year to collect or establish a right to collect salary or wages. · You can also deduct legal fees you paid in the year to collect or establish a right to collect other amounts that must be reported in employment income even if they are not directly paid by your employer. However, you must reduce your claim by any amount awarded to you for those fees or any reimbursement you received for your legal expenses. In some cases, you may also be able to deduct certain accounting fees (Safety Deposit Box Rentals are not deductible).	<input type="checkbox"/>	<input type="checkbox"/>	Employment Income · T4 slips.	<input type="checkbox"/>	<input type="checkbox"/>
Medical or Attendant Care Expense · Receipts for self, spouse and dependents for the current year, together with any items not used in the prior year; T929 for attendant care. · Travel expenses (at least 40km) - the cost of public transportation expenses (for example, taxis, bus, or train) when a person needs to travel at least 40 kilometers (one way), but less than 80km, from their home to get medical services. · Travel expenses (at least 80km) - the cost of the travel expenses, including accommodations, meals, and parking, when a person needs to travel at least 80 kilometers (one way) from their home to get medical services.	<input type="checkbox"/>	<input type="checkbox"/>	Employment Expense · Completed form T2200 signed by employer for supplies, auto, tradespersons tool's, or other expenses. · Expense vouchers or summaries, mileage logs. · Union, professional dues.	<input type="checkbox"/>	<input type="checkbox"/>
Donations · Official receipts for the current or prior years.	<input type="checkbox"/>	<input type="checkbox"/>	OAS and CPP · T4A(OAS), T4A(P).	<input type="checkbox"/>	<input type="checkbox"/>
Political Contributions · Official receipts (Federal and Provincial).	<input type="checkbox"/>	<input type="checkbox"/>	Other Pensions · T4A, T4RIF, T4RSP slips.	<input type="checkbox"/>	<input type="checkbox"/>
Quarterly Installments · CRA statements or summary of payments. · If made, amount of payments.	<input type="checkbox"/>	<input type="checkbox"/>	Employment Insurance Benefits · T4E slips.	<input type="checkbox"/>	<input type="checkbox"/>
			Interest and Other Investment Income · T5, T3, T4PS and T-BD(1) slips. · List of compound interest bonds & long term investments owned. · Details of mortgage payments received.	<input type="checkbox"/>	<input type="checkbox"/>
			Rental Income · Summary of rent receipts and expenses. · Prepared financial statements if available.	<input type="checkbox"/>	<input type="checkbox"/>
			Other Income · Scholarships, retiring allowances, RESP's, IAAC's.	<input type="checkbox"/>	<input type="checkbox"/>
			Taxable Capital Gains / Allowable Capital losses · Stockbrokers' statements, commodity or precious metal trading statements. · Legal documents regarding the sale of real estate, invoices for legal fees, commissions. · Receipts for sale of other property. · Gifts of property to others (over \$1,000 value).	<input type="checkbox"/>	<input type="checkbox"/>
			Tax Shelter Income / Losses · Financial statements, tax slips and filing information for MURBS, limited partnership and tax shelters.	<input type="checkbox"/>	<input type="checkbox"/>
			Business, Professional, Farm and Commission Income · Documents required statement preparation or prepared financial statement. · "Out of pocket" expenses not included in prepared financial statement (example: interest on business loans, professional dues, income protection insurance, promotion conventions, auto expense or offices in the home).	<input type="checkbox"/>	<input type="checkbox"/>

Questions?

Call or visit | T.F. 1.866.644.2944 | vsaccounting.ca