

**GSA GARY S. ASLETT PROFESSIONAL CORPORATION**  
Chartered Professional Accountant • Chartered Accountant • Certified Financial Planner

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## PERSONAL INCOME TAX DOCUMENTS LIST

NAME: \_\_\_\_\_

TAX YEAR: \_\_\_\_\_

### INCOME SLIPS

- T3 Statement of Trust Income allocations
- T4 Employment Income
- T4A Other Income (commission, pension)
- T4A(OAS) Old Age Security Pension
- T4A(P) Canada or Quebec Pension
- T4RSP/RIF RRSP or RRIF Withdrawal or Annuities
- T4A-RCA Distributions from an RCA
- T4E Statement of Employment Insurance
- T4PS Statement of Employee Profit Sharing Plan
- T5 Interest or Dividends
- T10 Pension Adjustment Reversal
- T101 Statement of Resource expenses
- T215 Past service pension adjustment (PSPA)
- T600 Ownership certificates
- T5006 Labour-sponsored Funds
- T5007 Statement of WSIB Benefits
- T5008 Security Transactions - Include capital gain/loss reports from your Investment Advisor
- T5013 Partnership Income
- RC62 Universal Child Care Benefit
- RC210 Working Income Tax Benefit advance payment

### OTHER INCOME

- Alimony/Child Support received
- Home Buyer's Plan withdrawal amount
- Other income not on a T4 slip eg. tips, directors fees, stock option benefits
- Foreign pensions received
- US Social Security
- Foreign Income from investments, business or employment

### Rental Income and Expenses:

- Complete Rental Property Expenses CHECKLIST\*

### Self-employment Income and Expenses:

- Complete Self-employed Expenses CHECKLIST\*
- Complete Home Office Expenses CHECKLIST\*

### Employment Expenses:

- Signed T2200
- Complete Automobile Expenses CHECKLIST\*

### DEDUCTIONS/CREDITS

- RRSP Contributions-including contributions within 60 days following the year
- Employment expenses-Complete Employment Expenses CHECKLIST\*
- Union or Professional Dues
- Public Transit receipts
- Interest paid on investment loans
- Investment Account Advisor management fees for non-registered accounts
- Safety Deposit Box fee \$ \_\_\_\_\_
- Accounting fees
- Legal fees (describe nature of legal fees)
- T2202 Tuition, education, and textbook amount certificate
- Child Care receipts (listed for each child)
- Children's Fitness receipts (listed for each child)
- Children's Activity receipts (listed for each child)
- Alimony/Child Support payments
- Student Loan interest
- Rent receipts
- Property Taxes statement
- Donations - Complete Donations CHECKLIST\*
- Political Contributions
- Medical/Dental Receipts - Complete Medical Expenses CHECKLIST\*
- Medical plan premium statement
- New home purchased in the year?
- Moving expenses - Complete Moving Expenses CHECKLIST\*
- Eligible for Disability Credit?
- Change in Marital Status?
- Living Common-law?
- Change in Dependants?
- Caring for Disabled person?

### OTHER CRA DOCUMENTATION

- Prior year Notice of Assessment
- Statement of instalments paid
- Other documentation received from CRA

\* CHECKLISTS available at [www.aslettca.ca/cklist.htm](http://www.aslettca.ca/cklist.htm)