



# INCOME TAX PREPARATION CHECKLIST

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Use this checklist to make sure you have all your receipts and income records when you come and see us so we can ensure we minimize your taxes, and you receive the maximum refund!

## TAX SLIPS

- Mutual funds (T3)
- Employment income (T4)
- Certain scholarships (T4A)
- Other pensions, annuities, CERB (T4A)
- EI Benefits (T4E)
- Old Age Security benefits (T4A-OAS)
- CPP benefits (T4AP)
- RRSP income (T4 RSP)
- RRIF income (T4 RIF)
- Investment income - interest, dividends, certain capital gains (T5)
- Worker's compensation benefits and/or social assistance payment (T5007)
- Partnership income (T5013)
- Conditions of employment / allowable employment expenses (T2200 or T2200S)
- Tuition (T2202A)
- Exploration and development expenses (T101)

## RECEIPTS

- RRSP contribution slips / FHSA
- Child support / alimony payments or receipts
- Medical expenses / medical trips for specialist (40 km or more)
- Professional or union dues
- Charitable donation receipts
- Political contribution receipts
- Interest paid on student loans
- Carrying charge and interest expenses
- Adoption expenses
- Moving expenses (including realtor's commissions)
- Office-in-home expenses
- Tool expenses (tradespersons)
- Exams for professional certification
- Attendant expenses. (Person must have a DTCC on file with the CRA.)
- Canadian Digital News subscription
- First Time Home Owners

## OTHER DOCUMENTATION / INFORMATION

- Amounts you have paid in tax instalments
- Last year's notice of reassessment
- Canada Revenue Agency correspondence
- Other carryforwards (for example, use-of-home expenses) – new clients
- Capital gains and losses information for stocks, bonds, real-estate, etc.
- Disability tax credit certificate
- Rental income & expenses
- Have you sold a house?
- Tips not on T4
- Small business income & expenses
- Commissioned employee expenses
- Vehicle logbook (self-employed people & commissioned employees)
- Volunteer firefighter's / Search and Rescue certificate
- Northern resident's deductions
- Legal expenses to collect alimony, pension or retiring allowances
- Business investment loss

## MOVED? MARITAL STATUS CHANGED? NEW ADDITION TO FAMILY?

Please PRINT your updated address, phone number, marital status or if there are any new additions to your immediate family below.

FIRST NAME: \_\_\_\_\_ LAST NAME: \_\_\_\_\_

SPOUSE: \_\_\_\_\_ LAST NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

PHONE: \_\_\_\_\_ CELL: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**How to Register for a CRA account:** <https://www.canada.ca/en/revenue-agency/services/e-services/cra-login-services/register-cra-sign-in-services.html>

**How to change/update your direct deposit information:** <https://www.canada.ca/en/revenue-agency/services/about-canada-revenue-agency-cra/direct-deposit/individuals.html>