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Professional Corporation

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Income Tax Checklist

Name: _____ **Tax year:** _____

Y N

- Change in name, address, dependants, marital status
- Previous year's tax return (New clients only)
- Previous year's Notice of Assessment
- Change in banking information with CRA

Slips:

- T4 - Employment income
- T4E - Employment insurance
- T3 or T5 dividends/interest/trust income
- T2202A - Tuition/education
- RC62 - Universal Child Care Benefit
- CPP or OAS
- T4A - Other pensions
- RRSP withdrawal

Other income:

- Self employment
- Rental property
- Child/spousal support received
- Sale of non-registered stocks/bonds/mutual funds
- First time homebuyers repayment

Deductions:

- RRSP contributions
- Child care expenses (camps)
- Moving expenses
- Carrying charges and interest expenses
- Investment management fees
- Interest on student loans
- Foreign income and pensions
- T2200 - To claim employment expenses
- Spousal support paid

Credits:

- Property taxes or rent
- Disability Tax Credit (self or dependent)
- Professional or union dues
- Charitable donations or political contributions
- Child fitness or art program
- Healthy homes renovation (over 65 max \$10,000)
- Medical expenses (must be >3% of your net income)

Other information: _____
