# Robbins Income Tax Company Checklist

# Slips

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Tuition / education receipts (T2202A)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A, T4RSP, T4RIF, T5013)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- All other information slips
- Declaration of Conditions of Employment (T2200) + related receipts
- Sale or deemed sale of stocks, bonds or real estate (T5008)

# Receipts

- RRSP contribution receipts
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons & apprentice mechanics)
- Medical expenses
- First time home buyers credit
- Charitable donations
- Political contributions
- Child care expenses
- Adoption expenses
- Moving expenses
- Interest paid on student loans
- Carrying charges and interest expenses
- Exams for professional certification

#### **Other Income**

- Tips, Casual Wages or Part Time Salary
- Rental income and expense receipts (T776)
- Business, farm or fishing income/expenses (T2125)
- Automobile / Travel logbook and expenses
- Office in-home expenses (possibly)

# **Additional Documents**

Notice of Assessment/Reassessment
Allowable Business Investment Losses
Canada Revenue Agency correspondence
Northern residents deductions receipts
Disability Tax Credit Certificate
Volunteer Firefighters certification
Search and Rescue volunteers certification
Custody Arrangement documentation
Principal Residence Disposition and Home Sale
Sellers Statement of Adjustments
GST Return
GST Installments
Personal Tax Installments

# **Comments:**