



Personal Tax Checklist

A-1 Accounting & Business Solutions Inc/Calgary EZ Tax Inc

Phone: 403-226-8297



Please provide us with any of the following items as they apply to your situation for the tax year that you would like us to file for you:

- Your legal name, date of birth, address, and phone number
- Your spouse or common-law partner's name, date of birth, and SIN number
 - If we are not filing your spouse's tax return, we will need to know their income for the year being filed.
- Legal names and dates of birth of all dependants (under 18 years of age)
- Child custody documents (child support or parenting orders, custody documents, if applicable)
- All income slips from all sources (T3, T4, T5, T4E, T4A, T4AP, T4RSP, T4RIF)
- Tuition & Education tax receipts (T2202A issued by your school, usually accessible online)
- Interest paid on student loans
- Childcare (nanny, daycare, lunch supervision, child tax credit information)
 - Child fitness or arts (can be claimed in years up to 2016)
- Charitable/Political donation receipts
- Medical receipts (prescriptions, chiropractic, natural healing {must be recognized by CRA}, dental, etc.) for the family if these have not been claimed by your spouse.
- Investment receipts (share purchase and sale information along with statement)
- RRSP contribution receipts
- Old Age Security and CPP benefits and other pensions and annuities
- Employment Insurance benefits, Workers' Compensation benefits, or Social Assistance payments (if applicable)
- Annual union or professional dues or similar
- Public Transit passes (can only be claimed in years up to 2016)
- Spousal support payment information
- Rental property information (if applicable – Checklist available)
- Moving expenses (if applicable – you must have moved at least 40 km from your previous address – Checklist available)
- Declaration of Conditions of Employment (T2200) and receipts for employment expenses you have not been reimbursed for.
 - Expenses can be claimed if you were reimbursed for these by your employer and they were included on your T4 slip.
- Any tax-related correspondence from the government for the current year

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