

AZURE TAXES

Personal Income Tax Checklist

Personal Information:

- ▣ Name, Address, Birth date, SIN for: you, your spouse or common-law spouse and your children
- ▣ Copy of your last tax return
- ▣ Copy of your last Notice of Assessment

Tax Slips:

- ▣ T4 Statement of Employment Income
- ▣ Other T4 statements that may be applicable, such as: T4A, T4E, T4A(OAS), T4A(P), T4PS, T4RIF, T4RSP, etc.
- ▣ RC62 Child Care Benefits
- ▣ T5 Statement of Investment Income
- ▣ T2200 Statement of allowable employment expenses signed by Employer
- ▣ T5007 Statement of Benefits from WS&IB or Social Assistance
- ▣ T5008 Statement of Securities Transactions
- ▣ T5013 Statement of Partnership Income
- ▣ T3 Supplementary (Capital Gains, etc...)
- ▣ T101, T102, T5103 from Exploration & Development Expenses

Official tax receipts for:

- ▣ RRSP's
- ▣ Tuition fees (T2202)
- ▣ Union & professional dues
- ▣ Charitable donations
- ▣ Children's fitness amount
- ▣ Children's art amount

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Receipts for:

- ▣ Medical and dental expenses including premiums paid for extended benefits
- ▣ Child care expenses or attendant care expenses for a disabled person
- ▣ Public transit passes
- ▣ Moving expenses if you moved 40+ kms to a new job or work location
- ▣ Interest paid on loans for investments
- ▣ Business investment consultation fees
- ▣ Details of any property sold

Other expenses:

- ▣ Commissioned sales person expenses
- ▣ Any legal expenses to collect alimony, pension or retiring allowances
- ▣ Information for any business investment losses
- ▣ Schedule of purchases & sale of securities commissions paid