

SVS ACCOUNTING SERVICE

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Canadian Tax Checklist

Dear Customer,

We want to make sure you get every tax credit and deduction you're entitled to.

So, before you get started on your taxes, make sure you have all the receipts and income records you need.

Here's a handy checklist:

Slips

- T4 Slips (Employment Income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Tuition / education receipts (T2202A)
- Universal Child care benefit (RC62)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- All other information slips

Receipts

- RRSP contribution receipts
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses
(Tradespersons & apprentice mechanics)
- Medical expenses
- Transit pass receipts
- Charitable donations
- Political contributions
- Child care expenses
- Adoption expenses
- Children's arts and sports program
- Moving expenses

Receipts (continued)

- Interest paid on student loans
- Carrying charges and interest expenses
- Office- in – Home expenses
- Exams for professional certification

Other documentation

- Notice of Assessment / Reassessment
- Canada Revenue Agency correspondence
- Sale or deemed sale of stocks, bonds or real estate
- Northern residents' deductions receipts
- Rental income and expense receipts
- Business, Farm or fishing income / expenses
- Automobile / Travel logbook and expenses
- Disability tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification
- Search and Rescue volunteer's certification
- Custody Arrangement documentation
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SOLE PROPRIETORSHIP

- Business registration certificate
(Master license copy, Business registration copy)
- Invoices for Income
- Invoices for Expenses (Fuel, repair, advertising, meals, insurance, internet)
- Interest paid for leasing or business loan
- Last year notice of assessment

CORPORATION

- Certificate of Incorporation
- Invoices for Income
- Invoices for Expenses (Fuel, repair, advertising, supplies, insurance, internet & Telephone, Etc.)
- Last year notice of assessment