

INCOME TAX CHECK LIST

Mak Tax wants to make sure you get every tax credit and deduction you are entitled to. Before you get started on your taxes, ensure you've all the records you need to complete the tax returns.

The following checklist will help you to organize your income and expenses records.

Slips
<ul style="list-style-type: none"><input type="checkbox"/> Employment income (T4)<input type="checkbox"/> Employment insurance benefits (T4E)<input type="checkbox"/> Interest, dividends, mutual funds (T3, T5, T5008)<input type="checkbox"/> Tuition / education receipts (T2202A)<input type="checkbox"/> Universal Child Care Benefit (RC62)<input type="checkbox"/> Old Age Security and CPP benefits (T4A-OAS, T4AP)<input type="checkbox"/> Other pensions and annuities (T4A)<input type="checkbox"/> Social assistance payments (T5007)<input type="checkbox"/> Workers' compensation benefits (T5007)<input type="checkbox"/> All other information
Receipts
<ul style="list-style-type: none"><input type="checkbox"/> RRSP contribution receipts<input type="checkbox"/> Support for a child, spouse or common-law partner<input type="checkbox"/> Professional or union dues<input type="checkbox"/> Tool expenses (Tradespersons & apprentice mechanics)<input type="checkbox"/> Medical expenses<input type="checkbox"/> Transit pass receipts<input type="checkbox"/> Charitable donations<input type="checkbox"/> Political contributions<input type="checkbox"/> Child care expenses<input type="checkbox"/> Adoption expenses<input type="checkbox"/> Children's arts and sports programs<input type="checkbox"/> Moving expenses<input type="checkbox"/> Interest paid on student loans<input type="checkbox"/> Carrying charges and interest expenses<input type="checkbox"/> Office - in-home expenses
Other documentation
<ul style="list-style-type: none"><input type="checkbox"/> Office - in-home expenses<input type="checkbox"/> Notice of Assessment/Reassessment<input type="checkbox"/> Canada Revenue Agency correspondence<input type="checkbox"/> Disability Tax Credit Certificate<input type="checkbox"/> Rental income and expense receipts<input type="checkbox"/> Business, income/expenses