

Income Tax Checklist

Income

- Employment - T4
- Employment Insurance - T4E
- RRSP Withdrawal - T4RSP
- WCB/Social Assistance - T5007

Other Income

- Rental Income, Expenses & Asset purchases
 - Self-Employment Income & Expenses
- Free income/expense forms available on our website

Pensions


- Canada Pension Plan - T4AP
- Old Age Security - T4AOAS
- Pension - T4A
- Foreign Pension (Italy, Germany, Portugal, UK etc.)
- RIF Withdrawal - T4RIF

Students

- Tuition - T2202 *get online from your institution
- Rent Receipt (off campus in Ontario only)
- Grants/RESP - T4A

Investments

- Interest/Dividend Income/Mutual Funds - T5 & T3
*T3 slips issued by March 31st
- Partnership Income - T5013
- Sold Shares: T5008 & Realized Gain/Loss report
- Investment Fees (Excluding RRSP/TFSA)



Please bring ALL slips and receipts at one time.

New Clients Only

- Previous year tax return
- Notice of assessment

Capital Gains

Did you sell an investment property? Yes No

Deductions

RRSP Contributions

- Last 10 months: March - December
- First 60 days: January & February
- Child Care Expenses: Daycare, half/full-day camps
- Employment Expenses: T2200 + Auto/Home Office
Free expense form available on our website
- Professional Dues: Nurses, Teachers, Tradespeople
- Spousal and Child Support
- Union Dues

Tax Credits - Provide Receipts

- Caregiver Amount (Dependent's SIN & net income)
- Charitable & Political Donations
- First Time Home Buyer
- Home Accessibility Expenses (Seniors & DTC)
- Interest on Student Loans (Provide annual receipt)
- Teaching Supply Expenses
- Medical Expenses (Summary of prescriptions & insurance claims)
- Tax Installments - Proof of payment

Name: _____

Let us know of any changes

Marital Status Change? Yes No

Date of change: _____

New marital status: _____

New Dependent? Son Daughter _____

Name: _____

Birth Date: _____

Net Income: _____

Approved for the Disability Tax Credit? Yes No

Name: _____

Did you move? Yes No

New Home Address: _____

Sale of Principal Residence Yes No

Owner Name(s): _____

Percentage of ownership: _____ % _____ %

Year Purchased: _____

Date Sold: _____ Sell Price \$ _____

Address sold _____

Are you a first time home buyer? Yes No

Home Buyers Plan? Yes No

Ontario Trillium Benefit

Property Taxes \$ _____

Rent Paid \$ _____

of months renting: _____

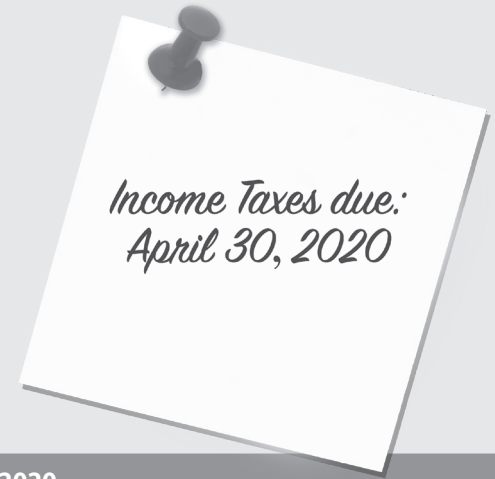
Landlord's Name: _____

Involuntary Separation: If you and your spouse or common-law partner lived in separate residences for medical reasons, you can both apply for the Ontario Energy and Property Tax Credit.

Attach this form to your tax documents



Important Dates to Remember



February 2020	March 2020	May 2020
<p>Visit your pharmacy for a free summary of your 2019 prescriptions</p> <p>Ask daycare for 2019 childcare receipt</p> <p>Ask landlord for your 2019 rent receipt</p> <p>Teachers gather your receipts for supplies</p> <p>Print your receipt for student loan interest</p> <p>Nurses, Teachers & Tradespeople: Print receipt from Ontario College</p> <p>Free forms available for employment expenses, rental/self-employment income. Visit exceltaxservice.ca</p> <p>Feb 22: Excel is now open Saturdays 9am-5pm</p> <p>Feb 28: T4 slips ready</p> <p>Feb 28: Students print your Tuition T2202</p> <p>Feb 29: RRSP contribution deadline is March 2nd</p>	<p>Mar 2: RRSP Contribution deadline today! Excel now open until 7pm weekdays</p> <p>Mar 13: Don't forget your RRSP Contribution slips for the first 60 days of 2020</p> <p>Mar 15: First 2020 instalment payment due today</p> <p>Mar 23: Call your financial advisor for your gain/loss report and carrying charges</p> <p>Mar 31: T3 slips mail out today</p>	<p>May 1: Late filing penalties today Penalties doubled for repeat late filers</p> <p>Excel regular office hours Mon – Fri: 9am to 5pm Sat & Sun: Closed</p> <p>Keep your tax returns and receipts for 6 years</p>
	April 2020	June 2020
	<p>Apr 10: Good Friday. Excel is closed today</p> <p>Apr 30: Filing deadline today! Self-employed must pay any balance owing for 2019 taxes and HST</p>	<p>June 15: Self-employed filing deadline today Second 2020 instalment payment due today</p> <p>June 16: Late filing penalties today for Self-employed returns and HST returns</p>
		July 2020
		<p>July 3: GST Credit payment</p> <p>July 10: Ontario Trillium Benefits payment</p> <p>July 17: Canada Child Benefit payment</p>

