

# Income Tax Checklist by Virtual Bookkeeping

## VIRTUAL BOOKKEEPING

*Helping you and your business thrive.*

### Income Tax Checklist

|                           |  |
|---------------------------|--|
| <b>Full name and DOB</b>  |  |
| <b>Address</b>            |  |
| <b>SIN</b>                |  |
| <b>Dependants and DOB</b> |  |

**Please include any of the below:**

#### Slips

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Workers' compensation benefits (T5007)
- Receipts
- RRSP contribution receipts
- Medical expenses
- Charitable donations
- Political contributions
- Child care expenses
- Moving expenses
- 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 of principal residence
- Sale or deemed sale of stocks, bonds or real estate
- Northern resident's deductions receipts
- Rental income and expense receipts
- Business income/expenses
- Automobile / Travel logbook and expenses
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification
- Search and Rescue volunteer's certification
- Written certification for eligible educator