

Use this handy checklist to **save time** and help gather your tax information! If you are planning to drop-off or mail-in your Personal Income Tax information to us this year, please **COMPLETE** the Intake Form and Engagement and Foreign Asset Disclosure Letter and submit them with your tax receipts to: admin@harbourfrontbastion.ca

Have you **included** the following?

<p>✓ CRA Assessments:</p> <p><input type="checkbox"/> Last year's Notice of Assessment</p> <p>✓ Employment Income:</p> <p><input type="checkbox"/> T4 <input type="checkbox"/> T4A</p> <p><input type="checkbox"/> T4PS <input type="checkbox"/> T4E</p> <p><input type="checkbox"/> T5007 <input type="checkbox"/> T5018</p> <p>✓ Pension Income:</p> <p><input type="checkbox"/> T4A <input type="checkbox"/> T4AOAS</p> <p><input type="checkbox"/> T4AP <input type="checkbox"/> T4RIF</p> <p><input type="checkbox"/> T4RSP <input type="checkbox"/> T10</p> <p>✓ Investment Income:</p> <p><input type="checkbox"/> T3 <input type="checkbox"/> T5</p> <p><input type="checkbox"/> T5008 <input type="checkbox"/> T5003</p> <p><input type="checkbox"/> T5013</p> <p>✓ Capital Gains:</p> <p><input type="checkbox"/> T5013</p> <p><input type="checkbox"/> Trading summaries from Brokers</p> <p><input type="checkbox"/> Annual statement from Mutual Funds</p> <p>✓ AgriStability / AgriInvest:</p> <p><input type="checkbox"/> T1163</p> <p><input type="checkbox"/> T1164</p> <p>✓ Other Income:</p> <p><input type="checkbox"/> Alimony, separation allowances, child maintenance (include divorce agreement)</p> <p><input type="checkbox"/> Professional fees / Director fees</p> <p><input type="checkbox"/> Scholarships, fellowships, bursaries</p> <p><input type="checkbox"/> Business income, partnership income</p> <p><input type="checkbox"/> Internet business activities</p> <p><input type="checkbox"/> Rental income and expense</p> <p><input type="checkbox"/> Self-Employment income and expense (CPP contributions / EI premiums)</p> <p>✓ Sale of Primary Residence Disclosure:</p> <p>➔ Please inform us if you have this year</p> <ul style="list-style-type: none"> • Sold your primary home; or • Change the use of your primary residence (i.e. from residence to rental, or from rental to residence) <p>➔ Complete the Sale or Disposition of Principal Residence Form</p> <p>✓ RRSP – Home Buyers' Plan:</p> <p>➔ Withdrawals and repayments</p> <p>✓ RRSP – Lifelong Learning Plan:</p> <p>➔ Withdrawals and repayments</p>	<p>✓ Deductions and Credits:</p> <p>Employment</p> <p><input type="checkbox"/> Employment expenses - T2200 (signed by employer, plus a list of the expenses)</p> <p><input type="checkbox"/> Tradespersons and apprentice tools</p> <p><input type="checkbox"/> Home office expenses</p> <p><input type="checkbox"/> Motor vehicle expenses (travel log required)</p> <p><input type="checkbox"/> Union/Professional dues</p> <p><input type="checkbox"/> Labour sponsored funds - T5006/EVCC30</p> <p><input type="checkbox"/> Educator school supplies expenses</p> <p>Home</p> <p><input type="checkbox"/> Moving expenses</p> <p><input type="checkbox"/> Home Buyers account</p> <p><input type="checkbox"/> Home accessibility renovation expenses</p> <p>Children and school</p> <p><input type="checkbox"/> Child care receipts</p> <p><input type="checkbox"/> Support payment information</p> <p><input type="checkbox"/> Adoption expenses</p> <p><input type="checkbox"/> Student Loan interest slips</p> <p><input type="checkbox"/> Tuition fees - T2202/2202A/TL11A</p> <p>Medical</p> <p><input type="checkbox"/> Disability supports deduction</p> <p><input type="checkbox"/> Caregiver/disability amount</p> <p><input type="checkbox"/> Medical/Dental/Optical receipts (less any reimbursements from Insurance)</p> <p><input type="checkbox"/> Premiums paid to Private/Travel Medical Insurance plans</p> <p>Investments</p> <p><input type="checkbox"/> RRSP (must be official receipts)</p> <p><input type="checkbox"/> Investment advice and accounting fees paid</p> <p><input type="checkbox"/> Interest on investment loans</p> <p>Other</p> <p><input type="checkbox"/> Donations (must be official receipts)</p> <p><input type="checkbox"/> Instalment payment information</p> <p>✓ Foreign Asset Disclosure:</p> <p>➔ Please use the Foreign Asset Checklist</p> <p>✓ Foreign tax returns filed:</p> <p>➔ Please include copies</p>
---	---

Thank you for choosing **Harbourfront&Bastion, Chartered Professional Accountant** for your personal tax planning needs!