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# Income Tax Checklist

## Income

- Employment - T4
- Employment Insurance - T4E
- Other Income (Covid-19) - T4A & T4PS
- RRSP Withdrawal - T4RSP
- WCB/Social Assistance - T5007
- Rental Income (Visit exceltaxservice.ca for rental form)

## Pensions

- Canada Pension Plan - T4AP
- Death Benefit CPP - T4AP \*Claimed by beneficiary
- Old Age Security - T4AOAS
- Other Pensions - T4A
- Foreign Pension (Italy, Germany, Portugal, UK etc.)
- RIF Withdrawal - T4RIF

## Investments

- Interest/Dividend Income/Mutual Funds - T5 & T3  
\*T3 slips are issued by March 31st
- Partnership Income - T5013
- Sold Shares: T5008 & Realized Gain/Loss Report
- Investment Fees (Excluding RRSP/TFSA/RIF Accounts)
- Sale of an Investment Property (rental/cottage)

## Students

- Tuition - T2202 - print from student account  
Tuition must be claimed on student's tax return before credits can transfer to a parent
- Rent Receipt (Ontario only)
- Lived in campus residence?  Yes  No
- RESP / Grants- T4A

Please bring ALL slips and receipts at one time.

- New Clients Only**
- Previous year tax return
  - Notice of assessment

## Self-employment

- Business Income & Expense Form (visit exceltaxservice.ca)
- HST Registration Number & Access Code (if applicable)

Filing deadline for self-employed and their spouse is June 15<sup>th</sup>, any tax owing must be paid by April 30<sup>th</sup>. You may estimate your balance due for April 30<sup>th</sup> and settle any remaining balance after filing on June 15<sup>th</sup>

## Deductions

- RRSP Contributions
- Last 10 months: March - December
  - First 60 days: January & February \*Slip issued mid-March
  - Child Care Expenses: Daycare, half/full-day camps
  - Home Office Deduction (Covid-19)
  - Employment Expenses (Detailed): T2200 + Auto and Home Office Expense Form available at [exceltaxservice.ca](http://exceltaxservice.ca)
  - Tool Expenses (Trades/Apprentice)
  - Professional Dues: Ontario College- Nurses, Teachers, Trades
  - Spousal Support (Include child support if applicable)
  - Union Dues

## Receipts / Tax Credits

- Charitable Donations
- Political Donations
- Digital News Subscription
- Disability Tax Credit
- First Time Home Buyer
- Interest on Student Loans
- Medical Expenses
- Ontario Staycation Credit
- Ontario Seniors Care at Home expenses
- Ontario Seniors' Home Safety Tax Credit
- Teaching Supply Expenses
- Tax Instalment Payments
- Property Taxes / Rent receipt

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: \_\_\_\_\_

Long Term Care - Provide annual statement

**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**

## Drop Off Service

### 1. Drop off your documents

Use our complementary envelope to gather your slips and receipts. Secure drop off slot available for **after** office hours.

### 2. Quick Pick Up

We will contact you once your return is ready for pick up.

### 3. You're done!

All documents will be returned to you.

**Payment options:** Debit, Credit Card, E-transfer, Cash.

## Online Service

### 1. Send us your documents online

Use our secure upload feature at [exceltaxservice.ca](http://exceltaxservice.ca), or send us your documents by email. PDF and pictures are acceptable. Combine multiple slips/receipts onto one page where possible.

### 2. Easy electronic signature

Receive a PDF copy of your tax return.

### 3. You're done!

**Payment options:** E-transfer or Credit Card over the phone.



## Important Dates to Remember

Tax filing deadline is  
**April 30<sup>th</sup>**

Self-employed deadline to file is  
**June 15<sup>th</sup>**

Tax owing is due by  
**April 30<sup>th</sup>**  
for individuals and self-employed

# Medical Expenses

People usually don't know that their medical expenses can give them significant tax credits. Anything from health insurance premiums to prescription medication (but not vitamin supplements) can count toward medical expenses. If those expenses are higher than three per cent of your annual income and you are taxable, then there's a possibility for tax savings. It is really important that you keep every receipt, because every dollar counts.



Ambulance service	•	Laser eye surgery
Assisted breathing devices	•	Massage therapy
Bathroom aids	•	Prescriptions*
Chiropractic	•	Service animal
Crutches	•	Vision care/Glasses/Contacts
Dental	•	Walking aids
Elasticized stockings	•	Wigs
Diapers/incontinence products	•	Attendant care / Long Term Care - can be claimed if you have been approved for the <i>Disability Tax Credit</i>
Health care premiums	•	
Hearing Aids	•	



### TAX TIP

- Visit your pharmacy for a free annual summary
- Print your annual private insurance claim summary

Students and low-income individuals may qualify for the refundable medical expense supplement.

### Involuntary Separation Due to Medical Reasons - Ontario Trillium Benefit

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

Bring in your property tax bill along with the annual receipt from the long-term care residence and we will apply for you.

# Disability Tax Credit (DTC) – T2201



## Do you or a family member have a prolonged impairment?

ADHD	•	Difficulty Walking	•	Parkinson's
Addiction	•	Eating Disorders	•	Physical Disability
Anxiety	•	Hearing Impaired	•	PTSD
Alzheimer	•	Irritable Bowel	•	Sleep Disorder
COPD	•	Learning Disability	•	Scoliosis
Depression	•	Mental Illness	•	Vision Impaired
Dementia	•	OCD	•	

## You may be eligible for the Disability Tax Credit.

The DTC amount is a non-refundable tax credit used to reduce your income tax payable on your income tax return. If you do not need the DTC to reduce your income tax payable, the credit can be transferred to a spouse or common-law partner or someone else.

You may be entitled to refunds, going back 10 years. Ask us for details.

## Can someone else sign my income tax return?

If you want someone such as your spouse, common-law partner, a family member, or a friend to sign your tax return, you must have authorized this person to be your legal representative.



Please include a photocopy of the Power of Attorney or Last Will.