



980 Burnhamthorpe Rd. E. @Tomken Rd.
Mississauga, ON L4Y 2X6 905-897-1588

Income Tax Checklist

***Keep receipts for 6 years.**

Income

- Employment - T4
- Employment Insurance - T4E
- Other Income - 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

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 15th, any tax owing must be paid by April 30th. You may estimate your balance due for April 30th and settle any remaining balance after filing on June 15th

Deductions

- First Home Savings Account Contribution - T4FHSA
- RRSP Contributions
 - Last 10 months: March - December
 - First 60 days: January & February *Slip issued mid-March
- Child Care Expenses: Daycare, half/full-day camps
- T2200 + Employment Expense Form (available on website)
 - Vehicle Expenses
 - Home Office Expenses (#10 must be more than 50%)
- Tool Expenses for tradespersons *Over \$1,368
- 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
- Teaching Supply Expenses
- Property Tax Bill
- First Time Home Buyer
- Disability Tax Credit
- Tax Instalment Payments
- Eligible Reno's (Seniors/DTC)
- Rent Receipt

Medical Expenses:

- Receipts NOT submitted to an insurance company.
- Annual detailed prescription report from pharmacy.
- Receipt for private health care insurance premiums.
- Annual private insurance claim summary ie: Sunlife, Canada Life (receipts not required with summary).

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

Come in and drop off your documents during office hours. Secure drop slot available for after 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, 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 30th

Self-employed deadline to file is
June 15th

Tax owing is due by
April 30th
for individuals and self-employed

T2200 – Declaration of Conditions of Employment

Form T2200 is provided to employees by their employer. This form allows employees to deduct expenses incurred to do their job. However, expenses that were reimbursed cannot be deducted.

- Vehicle expenses
- Meals with clients
- Cell phone (employment use)
- Home office expenses
***Watch our: How-to video**
- Promotional expenses
- Office supplies

Medical Expenses

People usually don't know that their medical expenses may give them significant tax credits. Anything from health insurance premiums to prescription medication (but not vitamin supplements) can count toward medical expenses. It is really important that you keep every receipt, because every dollar counts.



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



TAX TIP

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

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.