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2013 Personal Income Tax Return Check List

provided by AccXpert Chartered Professional Accountant (CPA)
and Certified Management Accountant (CMA)

1. *Name, address, date of birth, S.I.N., citizenship, and province of residence on end of last year*
2. *Personal status – single/married/common-law/separated/devoiced/widowed. If married or common-law: spouse/partner's income, S.I.N., birth date.*
3. *List of dependants/children – including their name, birth dates, S.I.N., and incomes*
4. *Last tax return Notice of Assessment and any letter from CRA*
5. *Copy of your last income tax return (T1 form) and last year income tax instalments or payment of tax*
6. *Details of foreign property (if fair market value over \$100,000 CAD) owned at any time in last year including cash, stocks, trusts, partnership, real estate, etc. Required details includes description of the property, related country, maximum cost in the year, cost at year-end, income, and capital gain/loss for each particular property.*
7. *All tax income information slips such as T3, T4, T4A, T4A(OAS), T4A(P), T4E, T4PS, T4RIF, T4RSP, T5, T10, T2200, T2202, T101, T1163, T1164, TL11A,B,C,D; T5003, T5007, T5008, T5013, T5018(Subcontractors), RC62 and corresponding provincial slips.*
8. *Details of other income for which no T-slips have been received such as:*
 - *Other employment income (including stock option plans and Election Form T1212)*
 - *Business income and/or Partnership income*
 - *Rental income*
 - *Alimony, separation allowances, child maintenance (including divorce agreement)*
 - *Pensions (certain pension income may now be split between spouses) and/or foreign pension income*
 - *Interest income earned but not yet received – e.g. Canada Saving Bonds, Deferred Annuities, Term Deposits, Treasury Bills, Mutual Funds, etc.*
 - *Professional fees and/or director fees*
 - *Scholarship, fellowships and bursaries*
9. *Details and receipts for:*

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- Registered Retirement Savings Plan (RRSP) contributions
- Rental expenses and/or property tax
- Tuition fees paid for you or a dependant and Forms T2202, TL11A,B,C,D
- Medical expenses for you and dependant person(s)
- Professional dues, union dues
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10. Details of other expenses such as:

- Employment related expenses – provide Form T2200 (Declaration of Conditions of Employment, signed by employer)
- Business and employment purchases like vehicles, tools, equipments and supplies, etc
- Interests on money borrowed to purchase investments and investment counsel fees
- Moving expenses – including costs of maintaining a vacant former residence
- Child care expenses, and amount paid for programs of physical activity or arts for children under age 16 (under 18 with disabilities)
- Alimony, separation allowances, child maintenance (including divorce agreement and support amount paid)
- Accounting, legal and other professional fees
- Business and medical travel expenses (travel logs may be required)
- Disability supports expenses (speech, sight, hearing, learning aids for impaired individuals and attendant care expenses)
- Public transit passes acquired

11. Details of capital gains and losses realized in 2013

12. Details of carry forwards from previous years including losses, donations, RRSP

Questions and Planning Points:

13. Are you disabled or any of your dependants disable? – provide Form T2201 (Disability tax credit certificate)

14. Are you the caregiver for any infirm family members?

15. Did you provide in-home care for a parent or grandparent (including in-laws) 65 years of age and over

16. Do you want your tax refund deposited directly to your bank account?

17. Have you received the Universal Child Care Benefit (UCCB) for each child under 6 years of age?

18. Are you a first-time home buyer?

19. Do you have interest paid on qualifying student loans?

20. Do you have home renovation expenses for seniors?

21. If income or required Forms have not been reported in the past to the CRA, a Voluntary Disclosure to the CRA may be available to avoid penalties.

22. Canada Pension Plan (CPP) receipts may be split between spouses aged 65 and over

23. It may be advantageous to apply to receive CPP early (age 60-65), ask us for details...

For more information, contact Accxpert TaxServices CPA/CMA at
613-366-5988 (office/voice) 613-600-6988 (mobile/text) or email TaxServices@AccXpert.com
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