



**To prepare your Tax return thoroughly please review the list below before you visit MJE Consulting. This will ensure that your tax return is prepared correctly so that any tax owed is minimized and any refund is maximized.**

## **Tax Document Checklist:**

Note that this is a sample of the most common documentation to complete most tax returns, if you have received other slips, receipts and documentation please bring it to your appointment.

### **T-Slips:**

- T4 Slips (Employment Income)
- Employment Insurance Benefits (T4E)
- Interest, Dividends, Mutual Funds (T3, T5)
- Old Age Security (T4A-OAS)
- CPP Benefits (T4AP)
- Other Pension and Annuities (T4A)
- Universal Child Tax Benefit (RC62)
- RRSP Income -Withdrawals (T4RSP)
- RRIF Income – Withdrawals (T4RIF)
- Workers Compensation (T5007)
- Social Assistance (T5007)
- Tuition / Education (T2202A)
- Partnership Income (T5013)
- Conditions of Employment (T2200)
- All other information slips

### **Other Documentation:**

- Notice of Assessment/Reassessment
- Canada Revenue Agency Correspondence
- Disability Tax Credit
- Sale of Stocks, Bonds or Real Estate
- Tax Paid Installments (if applicable)
- Carry Forward Amounts (ie Home Expenses)
- Rental Income and Expenses
- Business, Farm or Fishing Income/Expenses
- Commissioned Employees Expenses
- Volunteer Firefighter's Certificate
- Northern Residents Deductions
- Foreign Property over \$100,000
- First time home buyer
- Internet Business Activities

### **Receipts:**

- RRSP Contribution Slips
- Medical Expenses
- Attendant Expenses for Disabled Person
- Professional or Union Dues
- Tool Expenses (Tradespersons)
- Transit (Bus) Passes
- Charitable Donations
- Political Donations
- Child Care Expenses
- Adoption Expenses
- Children's Arts and Fitness/Sport Programs
- Child Support, Spouse or Common-law partner (payments or receipts) \*
- Moving Expenses
- Interest Paid on Student Loans
- Carrying Charges and Interest Expenses
- Office – In-home expenses
- Exams Fees for Professional Certification
- Not sure if a receipt is tax deductible, bring it along and we'll let you know

**To have your tax return prepared professionally please contact Michael at 506-380-8142 or via email at [mjeconsulting@bellaliant.net](mailto:mjeconsulting@bellaliant.net) to set up your appointment.**

**Can't come to an appointment, MJE Consulting can complete your taxes from anywhere in Canada. Please email for details.**

**Check out [www.mjeconsulting.ca](http://www.mjeconsulting.ca)**

## Other Checklists:

### Employment Expenses:

(include signed T-2200 Declaration of Employment Conditions from your employer)

- Accounting & Legal fees<sup>1</sup>
- Advertising<sup>1</sup>
- Meals & Entertainment<sup>1</sup>
- Training<sup>1</sup>
- Travel & Lodging
- Parking
- Supplies (stationery, other)
- Telephone
- Other expenses
- Vehicle Expenses
- Home Office Expenses

1. Applies to commission employees only

### Vehicle Expenses:

(if eligible to claim)

- Year and make of vehicle
- Purchase or Lease (price)
- Date of purchase or lease
- Include purchase or lease agreement
- Km's driven for business purposes
- Total Km's driven in year
- Log book
- Fuel
- Repairs & Maintenance
- Insurance
- License & Registration
- Car washes
- Parking
- Other

### Home Office Expenses:

(if eligible to claim)

- Area of home used for business purposes (sq. ft)
- Total area of home (sq. ft)
- Utilities (heat, hydro, water)
- Insurance (self-employed & commission employee only)
- Maintenance & Repairs
- Mortgage Interest (self-employed only)
- Property Taxes (self-employed & commission employee only)
- Security monitoring fees
- Other.

### Rental Property(ies):

- Address of rental property
- % of ownership
- Name(s) and SIN #'s of co-owners (if applicable)
- Personal use of rental property?
- Rental Income received
- Advertising
- Insurance
- Mortgage Interest
- Office expenses
- Legal & accounting fees
- Management / Admin fees
- Repairs & Maintenance
- Property Taxes
- Travel Expenses (more than one unit)
- Utilities (heat, hydro, water)
- Other
- Major renovations?
- Appliance purchases?