

CHECKLIST (20)

NAME: _____

SIN # _____

INCOME

		In	O/S
Employment			
- T4 Statement of Remuneration	T4		
- Research grants			
- Directors' fees			
Public Pension			
- OAS	T4 A(OAS)		
- CPP (retirement, disability, (death benefit & survivor benefits)	T4 AP		
Private Pension			
	T4 A		
- Superannuation			
- RRSP			
- RRIF			
- Annuity			
Taxable Dividends & Interest			
- T3 and/ or T5			
- Self-reported			
- Statement of securities	T5008		
Partnership Income / Losses			
- T5013			
- Statements			
Other			
- RRSP withdrawals	T4 RSP		
- RESP withdrawals			
- Unemployment benefits	T4 E		
- Statement of benefits	T5007		
- Scholarships / Bursaries	T4A		

DEDUCTIONS

		In	O/S
Expenses			
- RRSP contributions			
- Tuition fees	T2202A		
- Child care expenses			
- Support payments			
- Charitable / political donations			
- Medical expenses / statements			
- Moving expenses			
- Carrying charges & interest			
- Safety deposit box			
- Employment Expenses	T2200		
- Professional Memberships			
- Auto & Home Office Expenses	Form 3		

Notes

Overseas

- Off Shore Business Income			
- Off Shore Employment Income			
- Overseas Assets	T1135		

(Please note that we will not include these items into your return unless proper documentation is provided)

Business Income and Capital Gains (Losses)

- Business Income			
- Capital Gains / Losses			

Please provide details of all capital gains and losses realized in 2005 including all brokerage statements and details of dispositions and purchases of these stocks or bonds.