

BRING YOUR KEY TAX RECORDS

GENERAL ITEMS

- 2014 notice of assessment
- T4 (employment); T4A (commissions and self-employed); T4E (employment insurance)
- T4OAS (old age security)
- T4A (pension income); T4A(P) (Canada Pension Income)
- T5 (investment income); T3 (income from trusts & mutual funds)
- T5007 (workers' compensation and social assistance payments)
- T5013 (partnership income)
- T4RSP/T4RIF (retirement savings plan income)
- RRSP contribution slips
- Medical receipts – pharmacy summary
- Charitable donations
- T2202(A) (tuition fees/education amount – self and dependants)
- Interest paid on student loan(s)
- Professional & Union dues
- Monthly details of foreign investment and real estate holdings, - including those in Canadian Investment accounts and related income
- Paid interest on Investment Loans
- Child and Spousal support income/payments – supporting documentation
- Separation agreement (if it is the first year)
- Child care expenses
- Property taxes/rent paid and to whom they were paid
- Details of stock transactions T5008 (shares sold and cost of those shares)
- Mutual Fund annual statements, showing transactions during the year and tax summary information
- Details of any cottage or investment property sales
- Attendant care expenses
- Sports Activities – Arts Activities Credits
- Transit passes
- Healthy Homes Renovation expenses
- Dependants (Names, Dates of Birth, SIN)

MOVING EXPENSES

- Movers Bill
- Truck rental
- Temporary Accommodations, Storage
- Meals
- Cost of selling old home
- Cost of buying new home
- Expense reimbursement from employer

RENTAL PROPERTY

- Address and number of units
- Rent collected per unit
- Mortgage interest
- Property taxes paid
- Utilities
- Repairs and maintenance
- Insurance
- Advertising
- Other rental expenses

BUSINESS AND FARM INCOME

For details of what documents you should bring in, please contact your local TurnerMoore office.

COMMISSION, EMPLOYMENT AND TRAVEL EXPENSES

- Signed form TL2 (transportation employee meal allowance)
- Signed form T2200 from employer (declaration of conditions of employment)
- Summary of auto operating costs (or receipts)
 - Fuel, Repairs, Insurance
 - Lease/Buy Info
 - Expense Reimbursements from Employer
 - Mileage Summary
- Advertising and promotion
- Cellular Telephone
- Hotels and Travel Costs
- Other expenses relating to earning this income
- Summary of Home Expenses including Insurance, Taxes, Repairs, Utilities, Mortgage Interest

US CITIZENS

A reminder that US Citizens must tax file returns regardless of residency.

SNOWBIRDS

You need to track all your days present in the US during the year so we may determine your US Filing requirements.

