



TAXES ON WHEELS

Personal Income Tax Return Check List

Prior to one of us coming to your location for the tax preparation, you should have available the following documentation as applicable:

- **Prior year's "Notice of Assessment(s) or Re-Assessment(s)"**
 - **Income of each person claimed as a dependent**
 - **Details of Capital Gains and Losses**, including purchase dates and costs and sales dates and costs
 - **Details of rental payments and/or property taxes paid**
 - **Income:**
 - All information slips (ie T4's, T5's, etc)
 - Amount of Employee Benefits with respect to:
 - Employer provided automobile
 - Imputed interest on loans
 - Other income (ie gratuities, tips, etc)
 - Amounts for which you did not receive an information slip
 - A list of Bonds or other investments where interest is compounded
 - **Business and Property Income and Expenses**
 - Income and expenses for each business and/or rental property
 - Details of Equipment, Vehicle and Property purchases, leases and/or sales (provide copy of purchase invoice or leasing contract)
 - **Deductions:**
 - Receipts supporting medical deductions
 - Receipts supporting donations and/or political donations
 - Receipts for RRSP purchases
 - Information re Alimony and/or Maintenance Expenses
 - Information re Child Care Expenses
 - Information re Moving Expenses
 - Safety Deposit Box Information
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