

RBFS TAX CHECKLIST



Here at Reliable Business & Financial Services we can help you deal with your tax obligations responsibly and efficiently. Our goal is to make sure you find every tax deduction you are eligible for and reap the maximum tax refund.

Before we start, here is a list of things you will need:

T – Slips

- Employment Income (T4)
- Pension & Annuity Income (T4A)
- Employment Insurance benefits (T4E)
- Universal Childcare Benefit (RC62)
- Investment Income (T3, T5, & T5008)
- Partnership Income
- Social Assistance & Worker's comp (T5007)
- Any other tax slips
- Tuition (T2202 or TL11)
- Statement of Old Age Security – T4A(OAS)
- Statement of Income from Registered Retired Income Fund (T4RIF)
- Statement of RRSP Income (T4RSP)
- Statement of Canada Pension Plan Benefits (T4AP)

Receipts

- Charitable Donations
- Interest paid on student loans
- Automobile expenses & Mileage logbook
- Transit Pass Receipts
- Advertising
- Telephone
- Meals & Entertainment
- Office Expense/Supplies
- Supplies/Purchases
- Child Care Expenses
- Professional or union dues
- Medical Expenses
- Subscription fees
- other employment expenses
 - Use of home expense: heat, electricity, insurance, maintenance, property tax, mortgage interest
- Freight & Delivery
- Car Lease Payments
- Fees, Dues, Licenses

Other Documentation

- Notice of Assessment/Reassessment
 - Tuition carry forwards
 - RRSP deduction limit / unused amounts
- Other CRA correspondence
- Sale of principal residence
- Capital Gains information (if no T5008 Slip)
- Rental income & expenses receipts
- Information about dependents
 - DOB
 - SIN
 - Post-Secondary Tuition available
- Sale of deemed sale of stocks, bonds, real estate
- Disability Tax Credit Certificate