



TDOT TAX
2015 Income Tax Checklist

Personal Information

- ✓ Name, Address, Birth date, SIN for: You, your spouse, and your children as well as their 2015 taxable income (if not filing their returns with us).
- ✓ Direct Deposit information (void check, direct deposit form) if wishing to set up or change information the CRA currently has.

Income

- ✓ T4 for employment income and commissions
- ✓ T4A (OAS) old age pension and T4A(P) Canada pension
- ✓ T4A for other income (including grants)
- ✓ T4E slips for Employment Insurance benefits
- ✓ T4RSP, T4RIF, completed T3012A slips for withdrawals from an RRSP or RRIF
- ✓ RC62 Universal Child Care Benefit
- ✓ T3 slips for investment income from a trust or mutual fund
- ✓ T5 slips for investment income
- ✓ T5007 for Worker's Compensation receipts
- ✓ Details of property addresses, income and expenses for rental properties
- ✓ Details of spousal/alimony or child support received
- ✓ Details of foreign income and foreign taxes paid
- ✓ Line 104 Tips and Gratuities not included in box 14 of your T4 Slips
- ✓ Details of Canada Savings Bonds (including series number) and other interest bearing investments, including principal, date of issue, interest rate and interest received during the year, income reporting method for each (cash, accrual, three-year accrual)
- ✓ T5013 Statement of Partnership Income
- ✓ T5018 Statement of Contract Payments (for amounts received)
- ✓ Capital gain/loss schedule if you disposed of capital property (shares, bonds, real estate, etc.) in 2015 and related documents (including broker's transaction slips and statements).
- ✓ Details of stock options exercised in 2015, including the fair market value of the stock when exercised, the amount paid by you and the date of exercise. If you

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- elected to defer the employment income benefit, we require a copy of the letter provided to your employer
- ✓ Any other receipts/slips that are considered income and are to be reported to the CRA

Deductions and Credits

- ✓ RRSP contribution receipts for 2015 and the first 60 days of 2016. Also, please include details of Home Buyer's Plan repayments and any pension adjustment reversals
- ✓ Form T2202A Tuition Fees Certificate. Please note that the T2202A includes the total eligible tuition fees paid during the year. Most educational institutions provide a copy of the T2202A via online student portals. Note only T2202A forms will be accepted as proof of tuition payment.
- ✓ Form T2202A Tuition Fees Certificate for your spouse or dependents. For transferring of tuition credits please ensure that form T2202A is signed by the transferee (the student).
- ✓ Examination fees paid in excess of \$100 to qualified institutions for professional designations and trades deemed appropriate by the CRA
- ✓ Supporting documentation related to the purchase of your first home if purchased in 2015 (FTHBTC up to \$750 credit)
- ✓ Volunteer Firefighter certification by fire chief if completed over 200 hours of volunteer work (VFTC up to \$3000 claim)
- ✓ Amount of safety deposit box rental
- ✓ Interest paid on investment loans requires a letter or statement from the lending institution stating the purpose of the loan and the amount of interest paid
- ✓ Interest paid on student loans under the Canada Student Loan Act or provincial equivalent
- ✓ Amount of spousal/alimony support payments that are made pursuant to a court order or a written agreement. Please indicate the name, address and social insurance number of the recipient. If you have not previously done so, please provide a copy of your separation agreement for retention in our files
- ✓ Amount of child support paid in the year made pursuant to a court order or a written agreement. Please indicate the name, address and social insurance number of the recipient. If you have not previously done so, please provide a copy of your separation agreement for retention in our files
- ✓ Receipts for Legal Fees to establish spousal or child support or to enforce an existing agreement

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- ✓ Child care expense receipts which include the name, address and social insurance number of the caregiver
- ✓ Receipts to support claim for the child activity tax credit (CATC). Please note that this credit is limited to \$500 per child
- ✓ Receipts to support claim for the child fitness tax credit (CFTC). Please note that this credit is limited to \$500 per child
- ✓ For children 17 or under in the 2015 tax year, please provide their social insurance number and date of birth.
- ✓ If the child does not have a social insurance number, please provide a copy of his or her birth certificate
- ✓ Adoption expenses
- ✓ Details of people you support and their medical status
- ✓ Medical and dental, prescription drug bills for yourself, spouse and dependents
- ✓ Payments to a private health insurance plan
- ✓ Disability tax credit claim T2201 form completed by an authorized health practitioner
- ✓ Charitable donation receipts
- ✓ Political contribution receipts
- ✓ Rent and Property tax receipts for the Ontario Energy Property Tax Credit please indicate the address, total rent or property taxes paid and the landlord/municipality to whom payment was made
- ✓ Receipts for professional or union dues paid
- ✓ Public transit passes purchased
- ✓ Moving expenses if you moved 40+km. to a new job, school or work location ✓
Form T2200 Declaration of Employment Conditions - Office and Employment Expenses if you are an employee and entitled to deduct employment expenses. This form **must be signed by your employer** and filed with your return. Also please provide details of your employment expenses including tradesperson and apprentice tools and complete the Motor Vehicle Worksheet, if applicable
- ✓ Any other deductions/receipts which may apply to your 2015 return, ask your TDOT Tax specialist

Other Information

- ✓ Have you made income tax instalments for 2015? (Yes / No) If yes, please provide us with Form INNS1 and/or INNS2 to claim the amount paid on Line 476.
- ✓ Please provide a copy of your statement of 2015 required repayment from CRA under The Home Buyer's Plan and the amount of repayment actually made.
- ✓ Please provide us with your spouse's and dependants' 2015 net income (unless we are preparing their returns). This information is important for determining

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the transfer of credits and deductions between spouses and dependants such as: tuition, medical, child care, pension income splitting etc.

- ✓ If this is our first time filing your return, please provide us with a copy of your 2014 return and your 2014 notice of assessment (and reassessment if applicable)
- ✓ Please provide a copy of your 2014 notice of assessment and notice of reassessment, returning and new clients
- ✓ Anything else deemed by the CRA to be included in the filing of your 2015 return.

Any questions you may have, please feel free to contact us, and we will gladly respond.

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