

Personal Tax Checklist



**FAR EAST
ACCOUNTING**
Helps your business grow

Stay organized and get a head start on tax season with this list of forms and receipts, you'll need to file your taxes

Personal Information

- Social Insurance Number (SIN)
- Date of birth
- Information about spouse/common-law partner
- Information about dependents
- Spouse and/or child net income amounts
- Tuition transfer amount from spouse or child
- Last year's tax return
- Notice of Assessment from last year's return
- Total amount of instalment payments made to the CRA
- Other CRA correspondence

Income

- Employment income (T4)
- Self-employed business income (T2125, T5013, T4A)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Rental income and expenses (T776)
- Old Age Security and CPP benefits (T4A-OAS, T4A-P)
- Pension and annuity income (T4A)
- RRSP and RIF income (T4RSP, T4RIF)
- Employment insurance benefits (T4E)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- Other income not reported on a slip (e.g. tips)
- RL-1 Employment and other income (QC only)

Other Information

- Sale of principal residence
- Sale or deemed sale of stocks, bonds or real estate
- RRSP deduction limit and unused amounts
- Tuition carry forward amounts
- Loss carry forward amounts
- Other carry forward amounts (donations, etc.)

Receipts

- RRSP contributions
- Employment expenses (T2200 signed by employer)
- Tool expenses
- Union dues not included on your T4 slip
- Exams for professional certification
- Teacher's school supplies
- Childcare expenses
- Support payments paid or received
- Adoption expenses
- Disability tax credit for self or dependents
- Medical expenses
- Personal attendant/facility care expenses
- Charitable donations
- Northern residents deduction
- Digital News subscription expenses
- Political contributions
- Moving expenses
- Home accessibility expenses
- Home Buyers' Amount
- Tuition expenses
- Student loan interest amounts
- Tax-exempt scholarships



SMALL BUSINESS CHECKLIST

Use this handy checklist to organize all the information you'll need to do your small business income taxes.

With Far East Accounting, we'll help you get back every dollar you deserve!

GENERAL INFORMATION		BUSINESS EXPENSES	
Business name:		Advertising expenses:	
Business number:		Meals & entertainment:	
Business address:		Bad debts:	
Business main product or service:		Interest and bank charges:	
GST/HST number:		Insurance:	
GST/HST access code:		Office expenses:	
Gross business income (including GST/HST):		Small tools and equipments:	
Partnership business number (if applicable):		Repairs and maintenance:	
Percentage of the partnership (if applicable):		Salaries, wages, and benefits:	
		Rent:	
		Property taxes:	
<i>COST OF GOODS SOLD</i>		Seminars and training:	
		Travel:	
Opening inventory of materials (start of the Year):		Business fees, licenses, dues and subscriptions:	
Purchase of materials:		Telephone:	
Closing inventory of materials (end of the Year):		Professional fees (legal and accounting):	
Sub-contracts:		Management and administration fees:	
Direct wage costs:		Delivery and freight (postage, courier):	
<i>VEHICLE EXPENSES</i>		<i>BUSINESS USE OF HOME EXPENSES</i>	
Make, model, year:		Area of home office:	
Date purchased or leased:		Total home area:	
Vehicle cost:		% of home office area:	
Business kilometers:		Heating:	
Total kilometers:		Electricity:	
% of Business mileage:		Water:	
Interest charges:		Home/Rental Insurance:	
Leasing cost:		Mortgage interest:	
Fuel and Oil:		Property taxes:	
Auto insurance:		Repairs & Maintenance:	
License and registration:			
Repair and Maintenance:			
Parking fees during business:			