



small business solutions inc.

Basic Tax Checklist

Forms and Statements

1) From your employer:

- T4 Statement of Employment Income
- T4A Statement of Pension, Retirement, Annuity, and Other Income

2) From a government agency:

- T4E Statement of Employment Insurance and Other Benefits
- T5007 Statement of Benefits (WCB or Social assistance)
- T4A(OAS) Statement of Old Age Security
- T4A(P) Statement of Canada Pension Plan Benefits

3) From your investment/banking institution:

- T5008 Statement of Securities Transactions – Individuals
- T3 Statement of Trust Income
- T5 Statement of Investment Income
- T4RIF Statement of income from a Registered Retirement Income Fund
- T4RSP Statement of RRSP Income
- T5018 Statement of Investment Income
- RRSP Contribution Receipt

- T5013 Statement of Partnership Income
- Capital gains statement
- Carrying charges

Possible deductions

(Expenses you have personally paid for, but you have not been reimbursed for).

- Medical receipts
- Charitable/Political donation receipts
- Childcare expense receipts
 - Daycare/afterschool care
 - Amount paid to a nanny
 - Summer camps
 - NO LONGER ELIGIBLE: Child fitness and arts activities
- Student loan interest receipts
- Tuition receipts (T2202 Statement of Tuition Paid)
- Dues paid to your professional association
- Certification exams for your professional association
- Teaching supplies paid by eligible educators eg. elementary and secondary school teachers and early childhood educators
- Moving expenses (If you moved at least 40km closer to work or school.)