Personal Income Tax Checklist

Use this handy checklist to ***save time*** and help gather your tax information!

If you are planning to drop-off or mail-in your Personal Income Tax information to us this year, please **COMPLETE** the Intake Form and Engagement and Foreign Asset Disclosure Letter and submit them with your tax receipts to the RHN office location closest to you, or upload to our secure online portal at www.rhncpa.com.

Have you ***included*** the following?

✓ **CRA Assessments:**
- ☐ Last year's Notice of Assessment

✓ **Employment Income:**
- ☐ T4 ☐ T4A
- ☐ T4PS ☐ T4E
- ☐ T5007 ☐ T5018

✓ **Pension Income:**
- ☐ T4A ☐ T4AOAS
- ☐ T4AP ☐ T4RIF
- ☐ T4RSP ☐ T10

✓ **Investment Income:**
- ☐ T3 ☐ T5
- ☐ T5008 ☐ T5003
- ☐ T5013

✓ **Capital Gains:**
- ☐ T5013
- ☐ Trading summaries from Brokers
- ☐ Annual statement from Mutual Funds

✓ **AgriStability / AgriInvest:**
- ☐ T1163
- ☐ T1164

✓ **Other Income:**
- ☐ Alimony, separation allowances, child maintenance (include divorce agreement)
- ☐ Professional fees / Director fees
- ☐ Scholarships, fellowships, bursaries
- ☐ Business income, partnership income
- ☐ Internet business activities
- ☐ Rental income and expense
- ☐ Self-Employment income and expense (CPP contributions / EI premiums)

✓ **Sale of Primary Residence Disclosure:**
- ➔ Please inform us if you have this year
  - Sold your primary home; or
  - Change the use of your primary residence (i.e. from residence to rental, or from rental to residence)
- ➔ Complete the Sale or Disposition of Principal Residence Form

✓ **RRSP – Home Buyers' Plan:**
- ➔ Withdrawals and repayments

✓ **RRSP – Lifelong Learning Plan:**
- ➔ Withdrawals and repayments

✓ **Deductions and Credits:**

Employment
- ☐ Employment expenses - T2200 (signed by employer, plus a list of the expenses)
- ☐ Tradespersons and apprentice tools
- ☐ Home office expenses
- ☐ Motor vehicle expenses (travel log required)
- ☐ Union/Professional dues
- ☐ Labour sponsored funds - T5006/EVCC30
- ☐ Educator school supplies expenses

Home
- ☐ Moving expenses
- ☐ Home Buyers account
- ☐ Home accessibility renovation expenses

Children and school
- ☐ Child care receipts
- ☐ Support payment information
- ☐ Adoption expenses
- ☐ Student Loan interest slips
- ☐ Tuition fees - T2202/2202A/TL11A

Medical
- ☐ Disability supports deduction
- ☐ Caregiver/disability amount
- ☐ Medical/Dental/Optical receipts (less any reimbursements from Insurance)
- ☐ Premiums paid to Private/ Travel Medical Insurance plans

Investments
- ☐ RRSP (must be official receipts)
- ☐ Investment advice and accounting fees paid
- ☐ Interest on investment loans

Other
- ☐ Donations (must be official receipts)
- ☐ Instalment payment information

✓ **Foreign Asset Disclosure:**
- ➔ Please use the Foreign Asset Checklist

✓ **Foreign tax returns filed:**
- ➔ Please include copies

Thank you for choosing **RHN** for your personal tax planning needs!

RHN Richmond, Unit 105-13900 Maycrest Way, **Richmond**, BC V6V 3E2
RHN Vancouver, Unit 200-2000 12th Avenue, **Vancouver**, BC V6J 2G2
RHN Kelowna, Unit 620-1620 Dickson Avenue, **Kelowna**, BC V1Y 9Y2
RHN Osoyoos, PO Box 604, Upper Suite, 8507 Main Street, **Osoyoos**, BC V0H 1V0