



2014 Personal Income Tax Preparation Information

Please bring as much of the following information/documentation with you as possible to ensure that we use all of the credits and deductions that you are eligible for, and to speed up the processing of your tax return.

BASIC INFORMATION		
Name, address, other contact info	Any taxes paid by instalments	
Marital status on December 31, 2014 as per Income Tax Act	Do you have any reporting requirements to other jurisdictions? Eg. US tax	
Children and other dependents	Elections Canada disclosure (default is "No")	
Did you own any assets outside of Canada with a cost base greater than \$100,000	Became or ceased to be a resident during the year	
OFFICIAL RECEIPTS	INCOME	
Charitable donation receipts	Alimony or child support received	
Prior year tax return as filed	Apprenticeship grants	
Medical receipts	Commissions	
Notice of Assessments from prior year(s)	Employment Income	
Political donation receipts	Employment insurance (EI) benefits received	
Receipts for union or professional dues	Interest, dividends, and other "investment" income	
RRSP contribution receipts	Investment income from foreign sources	
T2200 Conditions of employment	Old Age and CPP benefits slips	
T2202A Tuition and Education Credit Certificate	Payments from deferred profit sharing plans	
T3, T5, T4E, T4AP, T4PS, T4RSP, T4RIF, T5007, T5013, T5008, RC62 or other "T" slips	Pensions & annuities (including foreign pensions)	
T4 or T4A slips	Rental income (and expenses)	
Tuition receipts – T2202, TL11A	Research grants	
	Social assistance payments	
	Stock and mutual fund transactions	
	Universal child care benefit	
	Workers' Compensation (WCB) benefits	
DEDUCTIONS	CREDITS	
Adoption expenses	Adult dependents or parents (over 65) who live with you	
Business investment loss	BC Apprenticeship credit	
Child care expenses	Caregiver credit information	
Employment expenses	Children arts tax credit	
Interest paid to earn investment income	Children fitness tax credit	
Investment management fees	Disability certificate(s)	
Moving expenses	Education credits from previous year(s)	
Northern residents	Interest paid on student loans	
Payment of support for a spouse or child	Monthly public transit passes credit	
RRSP contributions	Tax instalments paid	
Stock options or shares receipts	Tuition fees paid to post-secondary institutions	



Self-Employed Tax Checklist

If you, (your spouse, or common-law partners) are **self-employed**, then the filing deadline for **both** returns is **June 17**. However, the deadline for payment remains **April 30, 2015**. Penalties and interest are applied if your taxes owing are not paid by that date)

Each industry has its own unique types of expenses and operating costs, so it is best to use this general list as a guide only. If you are unsure, just bring in any additional documentation relating to your business.

Some clients prefer to do some of the initial organizing of these documents to reduce their bookkeeping costs. If you choose to do your own sorting, use the categories, adding any other relevant documents to the package. Date sort is not needed, but should all be 2014 related only.

GST REGISTRANT		BUSINESS USE OF HOME	
Copy of 2013 GST return filed		Heat, electricity and other utilities	
		Maintenance	
INCOME AND SALES INFORMATION		Mortgage interest only	
Invoices, sale records		Property taxes	
Credit card and bank statements		Rent	
Deposit book		Telephone	
Merchant service statements			
		BUSINESS USE OF VEHICLE	
EXPENSES		Fuel and oil	
Direct wage costs		Insurance	
Purchases and costs of goods sold		Interest paid on financing	
Sub-contracts		Leasing costs	
Advertising		License and registration costs	
Bad debts		Maintenance and repairs	
Delivery, freight and shipping		Parking	
Insurance		Total # of kms driven for business use	
Interest and bank charges		Gross total # of kms driven in the year	
		ASSET PURCHASES (OVER \$500)	
Management and administration fees		Car	
Meals and entertainment		Computers	
Office expenses		Equipment	
Other expenses		Furniture	
Professional fees			
Property taxes		ASSET SALES	
Rent		Date	
Supplies		Price	
Telephone and utilities		Trade-in	
Travel			