



Leading Edge Financial Solutions Inc. ensures every tax credit and deduction are applied to your tax return. Please use the following Checklist to gather all information, T slips, receipts and other documentation to get the maximum refund or minimize your taxes.

## TAX RETURN CHECK LIST

### GENERAL INFORMATION:

- Your Name, spouse & dependents
- Previous Year Notice of Assessment/Reassessment
- Letters from CRA
- Changes to status: address, marriage, births and deaths
- Installment payments
- Foreign property holdings

### EMPLOYMENT AND BUSINESS INCOME:

- Employment income (T4 slips)
- Employment Insurance (T4E)
- Investment, dividend and interest income (T5,T3)
- Universal child care benefit (RC62)
- Pension income (T4A, T4A(P), T4RIF, T4RSP)
- Old age security (T4OAS)
- US Social Security, Foreign Pension
- Income from partnerships (T5013)
- Workers compensation/social assistance payments (T5007)
- Rental Income
- Business/Professional/Commission Income
- Sales of stocks, bonds or real state
- Foreign Income
- Spousal support

### DEDUCTIONS AND CREDITS:

- RRSP contributions
- Charitable donations
- Public Transit passes
- Medical, dental, prescription drugs, nursing home expenses
- Private health insurance plan
- Tuition fees (T2202A)
- Student loans interest
- Professional dues, union dues
- Children's program on sports and arts
- Child care expenses
- Interest on investments
- Safety deposit box fees
- Professional consulting fees
- Medical support for seniors
- Property taxes or Rental payment
- Moving expenses 40km and above
- Disability tax credit (T2201)
- Spousal support payments
- Renovation expenses for seniors
- Political contributions
- Legal fees paid to recover wages from employer
- Legal fees for child support
- Adoption expenses
- Condition of Employment (T2200)
- Employment Expenses
- Trade tools expenses
- Motor Vehicle Expense
- Mileage Log
- Home Office Expenses
- Rental Income expenses
- Business Income expenses
- Vehicle leasing/purchase receipt
- Capital assets receipts
- Northern residents deductions
- Volunteer Firefighting certifications
- Farm or fishing expenses