

Relevant Information

T-SLIPS (INCOME)

(These are the standard prescribed forms on which Canadian income is reported)

Employment income

Employment/commission income	T4, T4A	_____
Director's fees	T4, T4A	_____
Employee profit sharing	T4PS	_____

Pension/retirement income

Pension/annuity income	T4A, T4A (OAS), T4A (P)	_____
Income from RRSP or RRIF	T4RSP, T4RIF	_____

Investment income

Interest & dividends	T5	_____
Mutual funds and other trusts	T3	_____
Other investment income – see last page		

Other sources

Income from RESP	T4A	_____
Employment insurance benefit	T4E	_____

OTHER INCOME

(including foreign income, pensions, sale of assets & other monetary items)

Details of all other income including pensions, directors' fees, scholarships, etc.

Foreign property is defined in subsection 233.3(1) of the *Income Tax Act* and includes:

- funds or intangible property (patents, copyrights, etc.) situated, deposited or held outside Canada;
- tangible property situated outside Canada;
- a share of the capital stock of a non-resident corporation;
- shares of corporations resident in Canada held outside Canada;
- an interest in a non-resident trust that was acquired for consideration;
- an interest in a partnership that holds a **specified foreign property** unless the partnership is required to file form T1135;
- a property that is convertible into, exchangeable for, or confers a right to acquire a property that is **specified foreign property**;
- a debt owed by a non-resident, including government and corporate bonds, debentures, mortgages, and notes receivable;
- an interest in a foreign insurance policy; and
- precious metals, gold certificates, and futures contracts held outside Canada.

Canadian resident individuals, corporations, and certain trusts that, at any time during the year, own specified foreign property with an original cost of more than \$100,000, must file a T1135 with their tax return.

DEDUCTIONS/TAX CREDITS

Receipts/forms are required for these deductions/credits (check those that apply):

RRSP contributions	_____
Home Buyers Plan withdrawals or repayments	_____
Lifelong Learning Plan withdrawals or repayments	_____
Charitable donations (provide details for in-kind donations, such as shares of stock)	_____
Political donations	_____
Professional/union dues	_____
Attendant care (if you claim the disability tax credit)	_____
Interest paid on student loans, or Canada Apprentice Loans	_____
Legal fees (<i>see Note 1</i>)	_____
Moving expenses (<i>see Note 2</i>)	_____
Alimony, maintenance or child support paid or received (<i>see Note 3</i>)	_____
Income tax installments (<i>see Note 4</i>)	_____
Employer signed T2200 for employment expenses	_____
Disability tax credit T2201	_____
Medical expenses (<i>see Note 5</i>)	_____
Tuition fees and Education deduction (<i>see Note 6</i>)	_____
Childcare expenses (<i>see Note 7</i>)	_____
Teacher/Early Childhood expenses (<i>see Note 8</i>)	_____

Note 1 If you incurred legal expenses in connection with employment termination, or claiming spousal or child support, please provide details.

Note 2 If you moved at least 40 kilometers closer to a new place of work or school, please contact us to request for T1-M.

Note 3 The amount of alimony, maintenance or child support paid or received in the year and the name, SIN, and address of the recipient, if applicable. Agreement is required when new, or changed.

Note 4 Details regarding income tax installment payments made during the year (include recent CRA statement of Account or cancelled cheques).

Note 5 Include receipts for all medical and health related expenses including nursing, nursing home, prescription eyewear, prescription drugs, supplemental health insurance premiums, medical devices and orthotics, ambulance, travel expenses, dental, chiropractic, and other medical treatments, or cost of specialized services required because of a medical or physical impairment. If any of these expenses were covered by insurance, please provide copies of all claims reports issued by the insurer.

Note 6 Dependant must complete and sign form T2202A if the credit is being transferred to a supporting person.

Note 7 Details regarding child care expenses for children 16 & under, including the name of the provider, social insurance number, if an individual.

Note 8 Consumable supplies (paper, science/art supplies, games, books, puzzles, containers, software, or similar) not refunded or covered by an allowance and not expensed by any school or business.
Will require employer verification & receipts.

Note 9 You can claim a non-refundable credit for transit passes until June 30, 2017.

OTHER INVESTMENTS

Interest and other carrying charges paid to earn income from investments (including interest charges, legal costs, accounting fees and investment counsel fees). **Excluding RRSP/TFSA accounts** _____

Gains or losses from selling securities – e.g. stocks, bonds or mutual funds. Include broker trading summaries or a transaction list showing date of each purchase and sale, currency, original cost and transaction fees. _____

Gains or losses (from selling property, businesses or other capital items) Summary showing date of each purchase and sale, currency, original cost and transaction fees. We also request the legal documents to assess if all items were considered. _____

Include capital improvements for properties (such as all large renovation costs not expensed, renovations prior to first renter or after last renter or if not rented, all improvements)

T5008, T101 _____