

T.J. HOLMGREN, CPA, INC.

CHARTERED PROFESSIONAL ACCOUNTANT

ACCOUNTING * AUDITING * INCOME TAX

#204-2180 Gladwin Road
Abbotsford, B.C., V2S 0H4

Phone (604)853-5705

Fax (604)853-5736

email trevorholmgren.cpa@gmail.com

TAX DOCUMENT CHECKLIST

This list is not exhaustive but can be used as a reminder for the most common income and credits reported. If you have any questions about your specific situation, please do not hesitate to contact our office.

SLIPS

- | | | |
|--------------------------|---------------|---|
| <input type="checkbox"/> | T4 slips | Employment Income |
| <input type="checkbox"/> | T4E | Employment Insurance Benefits |
| <input type="checkbox"/> | T4A-OAS, T4AP | Old Age Security & CPP Benefits |
| <input type="checkbox"/> | T4A | Other Pension & Annuities |
| <input type="checkbox"/> | T3, T5 | Interest, Dividends, Mutual Funds |
| <input type="checkbox"/> | T5007 | Social Assistance Payments / Worker's Compensation Benefits |
| <input type="checkbox"/> | T2202A | Tuition / Education Receipts |

RECEIPTS

- | | | | |
|--------------------------|----------------------------|--------------------------|--------------------------------|
| <input type="checkbox"/> | RRSP Contribution Slips | <input type="checkbox"/> | Child Care Expenses |
| <input type="checkbox"/> | Professional or Union Dues | <input type="checkbox"/> | Moving Expenses |
| <input type="checkbox"/> | Medical Expenses | <input type="checkbox"/> | Interest Paid on Student Loans |
| <input type="checkbox"/> | Charitable Donations | <input type="checkbox"/> | Office-In-Home-Expenses |
| <input type="checkbox"/> | Political contributions | | |

OTHER INFORMATION

- Sale of Stocks, Bonds or Real Estate
- Sale of Your Principal Residence - provide us with:
 - Year you purchased the house sold
 - Approximate purchase price
 - Statement of Adjustments of the sale (found in the package from your lawyer)
- Rental Income/Expenses
- Business, Farm or Fishing Income/Expenses
- Automobile/Travel Logbook/Expenses
- Disability Tax Credit Certification
- Volunteer Firefighters Certification
- Search & Rescue volunteers Certification

