



ATLAS FINANCIAL GROUP CORP.

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Personal Tax Preparation Checklist

Please take the time to ensure that you have all relevant documents. This will ensure the most accurate return with maximized savings.

Income Items

- Previous year's tax return
- Previous year's Notice of Assessment
- All information slips (example: T4, T4A, T4E, T4A(OAS), T5, T3, T5007)
- Investment income not on slips (Interest, Dividends, Capital Gains, Stock Transactions)
- Partnership statements
- Rental property income and expenses
- Business or professional income and expenses
- Sale of property including books, bonds, and real estate - provide details
- Other income (example: RRSP withdrawal, foreign pension income)

Deductions

- RRSP contributions
- Union or Professional Dues
- Childcare expenses
- Interest expenses related to business or investments
- Safety Deposit Box
- Alimony or Child Support
- Moving expenses
- Employment expenses (Automobile or Home Office) - You require a signed T2200
- Prior Year Losses

Tax Credits

- Medical Expenses
- Disability
- Tuition fees -Form T2202A signed by student
- Interest paid on student loans
- Charitable donations
- Political donations
- Tax Shelters – provide details
- Adoption Expenses – provide details
- Public Transit Passes
- Child Fitness and Arts Expenses
- BC Venture Capital tax credit
- Tax installments - TD7 slips or details

Personal

- Spouse - provide social insurance number, date of birth, income and deductions
- Dependants - provide social insurance number, date of birth and net income