Peritus
Tax and Accounting
International Tax & Bookkeeping Experts

Tax Checklist

The following information provides a general guideline of information we suggest you provided when having your return prepared. Please feel free to bring along any additional information you see fit or important to your tax return.

- Prior year's tax returns (new clients only)
- Prior year notice of assessment (new clients only)
- All personal information for all included in the return. (SIN Numbers, address, dates of birth, marital status, dependents etc.)
- T4 Statement of Employment Income
- Tips/Gratuities
- T3 for trust and dividend income
- T5 for investment income
- Pension income (OAS, CPP, T4A, T4RIF, Social Security, US & foreign pensions etc.)
- Gains/Loss report from bank or financial advisor
- RRSP withdrawals o RRSP contributions
- Charitable donations
- Rent or property tax receipts
- Medical expenses (please have these receipts organized)
- T2202 forms for tuition / TL11A or TL11C- foreign Education Institution
- Student loan interest
- Child care payments
- Interest and carrying charges paid to earn investment income
- T2200 or TL2 for employment expenses
- Moving expenses if you moved more than 40km closer to your place of work – see worksheet
- Spousal and child support payments made or received
- If you have a business, rental, or claim employment expenses please complete the necessary forms also provided.
- Home Office Expenses (Simplified Method allows a deduction of $2.00/ Day to a Maximum of $500.00)
- T622 Digital News Subscription Tax Credit (For qualifying Canadian journalism organizations see provided form)