

DC Nagy Consulting

Phone: (416) 238-4371 Email: income.tax@dcnagy.ca

Web Address: <http://www.dcnagy.ca>

Documents Which May Be Required For The Preparation of Personal Income Tax Returns

Personal Information for all members of Family Living Together or going to school:

- Name
- Address
- Telephone Number (Home)
- Date of Birth
- Social Insurance Number (SIN)
- Marital Status and date of any changes during the calendar year
- Previous Surname if applicable
- Relationship to Head of Household
- Province of Residency as at December 31st of tax year
- Date of Entry or Departure if Canadian Residency Status changed during tax year
- Province of Self-Employment if applicable
- Property taxes and or Rent Paid during year
- Name of Landlord or Municipality (including Roll Number) where Property taxes or Rent is paid
- Answers to the following questions:
 - Did the family receive any child tax benefit?
 - Is any family member mentally or physically impaired?
 - Did any family member incur tuition fees or education amounts or interest on student loans?
 - Did any family member pay income tax installments during the year?
 - Are any family members deceased in the current or subsequent tax year?
 - Are any family members bankrupt?
 - Are any family members non-resident electing under Section 216 or 217?
 - Did the family incur child care expenses in the year?

Government Documentation:

- Prior Year Notice of Assessment
- Prior Year Notice of Reassessment (if applicable)
- Home Buyers Plan Statement
- Documents received from Revenue Canada during the past calendar year

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TForms (Tax Forms received from outside sources, ie Employer, Financial Institution, Etc):

Please note that most forms have a deadline of the last day in February to be issued. The one notable exception is T3's which have a deadline of March 31st to be issued.

The most common TForms are as follows:

- T101 Statement of Resource Expenses
- T2201 Disability Certificates
- T2202 Tuition and Education Amounts Certificate
- T3 Trust Income
- T4 Employment Income
- T4A Pension and Retirement Income
- T4A(OAS) Old Age Security Income
- T4A(P) Canada Pension Income
- T4A(RCA) Statement of Distributions from a Retirement Compensation Agreement
- T4E Employment Insurance Income
- T4F Fishing Income
- T4PS Employee Profit Sharing Payments
- T4RIF Retirement Income Fund Income
- T4RSP Retirement Savings Plan Income
- T5 Investment income
- T5003 Statement of Tax Shelter
- T5004 Statement of Tax Shelter Loss or Deduction
- T5007 Statement of Benefits (WCB and Social Assistance)
- T5008 Statement of Securities Transactions
- T5013 Statement of Partnership Income
- GST370 Employee and Partner GST Rebate
- RC210 Working Income Tax Benefit Advance Payments Statement
- RC62 Universal Child Care Benefit

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Deductions:

Child Care Expenses including the following information:

- Name of Person or Organization supplying services
- SIN of Person supplying services

RRSP Receipts from financial institutions

Labour –Sponsored Funds Receipts

Medical Receipts including:

- Prescriptions
- Dental
- Eye Glasses
- Medical Insurance Premiums to Non-Government Plans
- Transportation costs to or from Medical services
- Other Medical Expenses not covered by Insurance

Donation Receipts

- Charitable donations
- Political donations

Alimony or Separation Allowance

Employment Expenses:

- Accounting & Legal
- Advertising & Promotion
- Food, Beverages and Entertainment Expenses
- Meals and/or Lodging (Travel Related)
- Parking
- Supplies (ie, postage, stationery, etc)
- Telephone
- Other Expenses
- Tradesperson's Tools Expenses
- Apprentice Mechanic Tools Expenses

Work Space in Home Expenses:

- Square footage of Home
- Square footage used to earn income
- Heat
- Electricity
- Insurance (self employed individuals and commission employees only)
- Maintenance
- Mortgage Interest (self employed individuals only)
- Property Taxes (self employed individuals and commission employees only)
- Rent
- Telephone
- Other Expenses (Please Specify)

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Vehicle Expenses:

- Total KM driven in taxation year
- Total KM driven in taxation year to earn income
- Date Lease Started
- Date Lease Ending
- Fuel
- Maintenance and Repairs
- Insurance
- Licencing or registration
- Leasing Costs
- Rebates, allowances and reimbursements that are not included in income
- Parking Expenses
- Un-depreciated Capital Cost of Vehicle at beginning of year
- Cost of any additions during year
- Proceeds of any disposals during year
- Vehicle Loan Interest Expense
 - Date Interest Payments Started
 - Date Interest Payments Ending
 - Total Interest Paid in the Fiscal Period
- Motor Vehicle Leasing Costs
 - Total Lease Payments in the Current Fiscal Year
 - Total Lease Payments Deducted in Previous Years
 - Total # of Days Vehicle Leased in this and previous Fiscal Periods
 - Manufacturer ' s List Price
 - Amount of Refundable Deposit
- Reimbursements Received in this and previous Fiscal Periods
- Reimbursements Received in this Fiscal Period

Self Employment Information (see your Accountant)

Farming Information (see your Accountant)

Real Estate Rental Information (see your Accountant)

Investment Information:

- Proceeds of sale of investments
- Cost of purchases of investments
- Carrying Costs of investments including:
 - Interest Costs
 - Management Fees Incurred
 - Professional Fees Incurred

Please note that the above is not intended to be all inclusive but will cover most situations.