
Zeppieri & Company Professional Corporation

Chartered Accountant

www.monetarygrowth.net

Certified Financial Planner

www.saveyourtaxes.ca

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Information to bring to complete your tax return

1. T4 slips, T4A(OAS) Pension Slips, Old Age Pension - T4A(P) slips, Canada Pension Plan
2. Tax instalments paid during the year
3. T4A slips, commissions, pension and other income
4. T4RSP slips, income from a registered retirement savings plan, T4RIF slips, income from a registered retirement income fund
5. T4E slips - unemployment insurance
6. T4PS slips, statement of employee profit sharing
7. T5 -T3 slips, interest, dividends, capital gains
8. T2200 Employment expenses form signed by employer i.e. are you required to use your car for work or incur other employment expenses? Trade person tools expenses also qualify (must have receipts for purchases)
9. Schedule of employment expenses: vehicle gas, repairs, maintenance, telephone, supplies, advertising, entertainment, office, payments to substitute or assistant, trade person tools receipts. You can deduct car expenses and if commission income, advertising, promotion, entertainment and home office expenses as well.
10. Legal fees paid to collect salaries and wages owing.
11. T2202 Tuition and Education Credit Certificate and tuition fees for continuing education
12. Student loan interest paid
13. T600 slips, Canada Savings Bonds
14. Charitable Donation receipts
15. Medical receipts, prescription drugs, eyeglasses, chiropractor, medical, dental and extended health care insurance premiums deducted off your paycheque or paid by you, travel health insurance premiums.
16. Rental income and expenses - separate by rental property - (rental income, property taxes, maintenance and repairs, interest, insurance, hydro, oil, gas, water, advertising, property management and car expenses if more than one property)
17. Schedule of capital gains and losses (sales of real estate property, shares and mutual funds or other investments during the year)
18. Child care expenses, (sports camps and education programs) receipts and name of person and SIN # , or name of institution
19. Alimony and child support paid or received (child support depending on date of agreement). Legal fees relating to support payments.
20. RRSP contribution slips
21. Amount of property taxes paid in year or Residential rent paid in year
22. Union or professional membership dues or fees
23. Safety deposit box rental receipts
24. T2201 Disability Deduction Certificate ask me if you are disabled or have become disabled during the year. Many people are not aware they qualify! Are your parents disabled? Contact me for further information.
25. Do you support any dependants who live with you i.e. infirm or disabled parents or children? You can claim additional deductions, the rules are complex and you should seek professional advice and assistance.
26. Moving expenses if you moved to be closer to your work place
27. T5007 slips, Workers compensation payment slips and Social assistance payment slips
28. Interest expense on money borrowed to earn investment income from shares or mutual funds i.e. investment loan or line of credit
29. Political party contribution slips Federal and Provincial
30. T5008 slips, statement of securities transactions - T5006 slips, labour sponsored funds tax credit
31. Transit pass payments
32. Fitness and arts tax credit eligible payments for minor sports and recreation associations
33. If you are a first time homebuyer in 2012 you may be eligible for the First Time Homebuyer Credit
34. RC62 slips Universal child benefits received
35. Adoption expenses
36. Foreign property owned at December 31 – you have to report any foreign property over \$100,000 CDN in total
37. Full legal name and birthdate of any children born in 2012

Remember to make your RRSP contribution by the end of February 2013 to get a tax deduction for 2012 TAX YEAR.

TAX FREE SAVINGS ACCOUNTS NOW \$51,000.00 PER COUPLE! (\$25,500 per person) If you have never contributed! Call me for further information!