

## PERSONAL TAX RETURN DOCUMENTS CHECKLIST - 2022

### DEDUCTIONS

- ☐ Adoption Expenses
- ☐ Air Quality Improvement
- ☐ Canada Caregiver Amount (Infirm Dependent)
- ☐ Child Day Care / Baby Sitting Expenses
- ☐ Children School Lunch Fees
- ☐ Children Preschool Registration & Fees
- ☐ Critical Mineral Exploration
- ☐ Covid-19 (Benefits) Re-Payment
- ☐ Digital News Subscription Expenses
- ☐ Disability Tax Credit - T2201 (Type-1 Diabetes)
- ☐ Donation Receipts
- ☐ Eligible Dependent - Child/Parent/Grandparent
- ☐ Employment Expenses
  - Employment Expenses (T777) - T2200/T2200s
  - Long Haul Truck Driver's Meal Expenses (TL2)
  - Tools for Handyman
- ☐ First Time Home Buyer Amount (2009 & after)
- ☐ Home Accessibility Expense (Disable people)
- ☐ Home Office Tax Deduction
- ☐ Investment Loan Interest
- ☐ Labour Mobility Deduction for Tradespeople
- ☐ Legal Expenses Paid During the Year to:
  - Collect Retiring Allowance or Pension
  - Collect Salary / Wages
  - Collect/Increase Support Payment
  - Appeal a Tax Assessment
- ☐ Medical
  - Medical Insurance & Expenses  
(Annual Statements of Prescription from your Pharmacy)
  - Medical Insurance with Employer (Bring Dec. Paystub)
  - Medical Expenses Outside of Canada including Travel expenses
  - Medical Expenses for Surrogacy
  - Infertility Claims for 10 previous years
  - Travel Insurance to Visit Outside of Canada
- ☐ Moving Expenses-Employment/Full Time Study
  - Personal Travel, Household Stuffs Moving
  - Realtor Commission on Sale of Old House
  - Any Repair to Old House for Sale
  - Legal Fees on Sale of Old House
  - Legal Fees on Purchase of New House
  - Vehicle Inspection & Registration at New Prov.

### DEDUCTIONS (Continued)

- ☐ Multigeneration Home Renovation (Tax Year 2023)
- ☐ Northern Residents Deduction for Each Individual (T2222)
- ☐ Political Contribution (Federal & Provincial)
- ☐ Professional Liability Insurance
- ☐ Professional & Union Dues
- ☐ Repayment Made During Year of:
  - Wage Loss Insurance Benefits
  - Salary / Wages
  - CPP Benefit Received in Previous Years
- ☐ RRSP (Mar-Dec 2022, Jan-Feb 2023)
- ☐ School Supply Credit (For Teachers)
- ☐ Split Pension Income with Spouse (T1032)
- ☐ Spousal Support Payments
- ☐ Student Loan Interest
- ☐ Tax Free First Home Saving Account (Tax Year 2023)
- ☐ TFSA Limit \$6500 (Tax Year 2023)
- ☐ Tuition Fees
  - Canada Training Credit
  - Tuition outside Canada - Online / TL-11A
  - Tuition Fee Receipt - T2202
  - Tuition Fee Carried Forward Amt.
- ☐ Volunteer Fire Fighter / Search & Rescue
- ☐ Anti - Flipping Tax (Property) (Tax Year 2023)

### E. & O.E.

### PERSONAL/SPOUSAL INFORMATION

- ☐ SIN ☐ Name ☐ DOB ☐ Address
- ☐ CRA Direct Deposit Information
- ☐ Last Year Notice of Assessment

### DEPENDENTS - LIVING WITH YOU CHILDREN/PARENTS/GRANDPARENTS

- ☐ SIN ☐ Name ☐ DOB ☐ Relation

### INCOME DOCUMENTS

- ☐ T4 ☐ T4A (Covid-19 Benefits) ☐ T4E
- ☐ T4RSP ☐ T4A(P) ☐ T4A (OAS) ☐ T4RIF
- ☐ T5007 ☐ T5008 ☐ T3 ☐ T5
- ☐ T5013 ☐ T5018
- ☐ Rental Income & Expense (T776)
- ☐ Capital Gain/Loss From Shares/Real Property
- ☐ Self Employed Income & Expenses (T2125)
- ☐ Spousal Support Payments

**Any Remuneration/Information Slip Missing ..... We are here to help you with CRA online Account.**

*A Referral is the highest honor a business can receive*



## ACCOUNTING & TAX AVENUE INC.

Corporate Accounts • Personal Tax Returns & Consultation

**9235A - 35 Ave. NW Edmonton, AB T6E 5Y1**

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- BN/GST Registration
- WCB Registration

*A Referral is the highest honor a business can receive*

- **Personal Tax Return ..... \$50**  
( Include ALL T4, T4A, T5, T4E, T4RSP, T4A(P), T4A(OAS), T5007, T2202A, Donations )  
Children's Information, Medical Expenses, RRSP Receipts, **Additional Charges Apply for Deduction/Credit Not Listed**  
Any Remuneration/Information Slip Missing ..... We are here to help you with CRA online Account.
- **Taxi Operator Statement ..... \$60**
- **Self Employed Statement ..... \$100-140**
- **Inactive Corporate Tax Return ..... \$200**
- **Active Corporate Tax Return ... Starts From \$450**

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