



YOUR MODERN ACCOUNTANT LTD.

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TAX SLIP CHECKLIST

Personal Income

- T4, T4A – Salaries, Employment, Pension
- T4E – Employment Insurance Benefits
- T4A(P) – CPP Benefits
- T4(OAS) – Old Age Security
- T4RIF – RRIF Income
- T5007 – Social Services Benefits
- T4A(P), T4A – Disability Benefits

COVID- related Support Payments

- Canada Emergency Benefit (CERB)
- Canada Recovery Benefit (CRB)
- Canada Emergency Student Benefit
- Canada Recovery Sickness Benefit (CRSB)
- Canada Recovery Caregiver Benefit (CRCB)
- Employment Insurance benefits
- Other – specify

Investment Income

- T3, T5, and T4PS – Interest and Dividends
- T3 - Income from Mutual Funds
- T5008 – Statement of Security Transactions
- Interest on Tax Refund
- T6000 – Canada Savings Bonds
- Rental Income*
- Capital Gains/Losses

Deductions

- T2200 – Declaration of Condition of Employment
- T2200S - Declaration of Condition of Employment for Working at Home Due to COVID-19

Deductions (cont'd)

- RRSP Contributions
- Professional (or Union) Dues
- Childcare Expenses (daycare, camp, babysitting)
- Alimony Paid

Other Income Professional/Business Earnings* Net Partnership Income (Loss)* Scholarship/Bursaries Alimony Received**Non-Refundable Credits** Charitable Donations Political Contributions Interest Paid on Student Loans Medical Expenses T2202 – Tuition fees for yourself, your partner and/or your dependant(s) Family Caregiver – supported dependant with physical/mental impairment Moving Expenses* Investment Carrying Charges on Investments Investment Counsel/Accounting Fees EI repaid Deductible Legal Fees TL2 – Claim for Board and Lodging Expenses Disability Deductions Attendant Care Expenses Capital or Non-Capital Losses Carryforward**Other** Home-Buyers' Plan Lifelong Learners' Plan

When finished reviewing all of the documents you may need for your taxes, you can then upload them through your login to our client portal and we'll get started! Don't have access to our client platform?, Email us to get started!

Any questions please contact us via e-mail: info@YourModernAccountant.ca

