

# VR eTax Centre Inc.

维尔电子税务中心

## T1 Checklist

### Confidentiality Commitment

**We are committed to protecting the confidentiality of the personal information we collect. Your information will be used only for preparing your tax return(s) and will not be disclosed to any third party except Canada Revenue Agency.**

我们郑重承诺保护您个人资料的安全。您的资料只会用于为您报税，不会披露给除加拿大国家税务总局之外的任何第三方团体或个人。

Please mark the items that apply to your situation and provide relevant supporting documents.

#### 1. Personal and family information

Please fill the “Client Information” sheet

#### 2. Income Information

**T4:** Employment Income

**T4A:** Statement of Pension Retirement, Annuity, and Other Income

**T4E:** EI benefits

**T3:** Statement of Trust Income Allocations and Designations (slip)

**T5:** Statement of Investment Income

**RC 62:** Universal Child Care Benefit

**T5007:** Statement of Benefits

**T4RSP:** Registered Retirement Saving Plan Income

**T5013 or T5013A:** Net partnership income from a limited partnership in which you are a limited partner or any partnership you are not an active partner.

**Capital Gain:** If you sold shares, mutual funds, bonds, real estate or any other capital properties in the tax year, please provide the name of the property, purchase date, total proceeds, original costs, and any trading expenses; or you can get a trading activity report from your broker and give us.

**Self – employment Business Income:** See Appendix I

**Rental Income:** See Appendix II

**Other slips:**

### 3. Deduction from Income

**RRSP deduction:** If you made RRSP contributions for the tax year, please provide receipts.

**Annual union, professional or like dues:** Provide receipts if the amount not shown on T4

**Child care expenses:** Provide receipts

**Moving expenses:** If you moved for employment, education or business purposes in the year, you may deduct total or part of your moving expenses from your income. Provide following information: moving related expenses, address of your old residence, address of your new residence, date of move, date you started your new job or business, or your studies, name and address of your employer, business, or educational institution after move.

**Support payments made:** If you made support (child or spousal) payments, please provide recipient's name, address, proof of payments, and any legal documents that require you to make the payments. Please note only spousal payments are deductible.

**Employment expenses:** See Appendix III.

**Other deduction if applicable**

### 4. Tax Credits

**Public transit amount:** Please provide your public transit passes or purchase receipts of them.

**Children's fitness amount:** Please provide receipts.

**Children's art amount:** Please provide receipts.

**Home buyer's amount:** Please provide the address of property and the acquisition date.

**Interest paid on student loans:** Provide the statement.

**Tuition, education, and textbook amount:** Provide T2202.

**Medical expenses:** Provide receipts of payments to a medical doctor, dentist, nurse, or certain other medical professionals or to a public or licensed private hospital; payments for artificial limbs, wheelchairs, crutches, hearing aids, prescription eyeglasses or contact lenses, dentures, pacemakers, prescription drugs, and certain prescription medical devices; and payments made by yourself for premiums of private health services plans.

**Donations and gifts:** Provide receipts.

**Amounts for infirm dependent (include caregiver amount):** Provide detail of dependent: name, SIN, and income, etc.

**BC training credits:** If you were a resident of British Columbia on December 31, of the tax year and you completed an eligible program administered through the British Columbia Industry Training Authority or you passed a challenge exam and received a *Certificate of Qualification* from the British Columbia Industry Training Authority in the tax year, you can claim this credit. Provide all relevant documents.

**Other tax credit if applicable.**

**5. Notice of Assessment for the year immediately prior the tax year if available.**