



Employment Deductions: (for T4s)

Refer to the checklist below, for any items that apply, please provide the documents associated with the items below:

- T4 Slip, T4A Slip, T4E slip, T3 / T5013 slip, T5 Slip, T4RIF, T4RSP, and T5018.
- Rental property income and expenses
 - Rent collected
 - Advertising
 - Insurance
 - Interest on mortgage
 - Bank charges
 - Office expenses
 - Professional fees
 - Management and admin fees (condo fees, real estate agent fees, etc.)
 - Repairs and maintenance
 - Property taxes
 - utilities
- RRSP contribution receipt.
- Union or professional dues receipt.
- Medical expense receipts.
- First time home buyer.
- Social benefits (caretaker expenses or disability)
- Childcare expense receipts.
- Charitable donation receipts.
- Moving expense receipts.
- Tuition fee receipts.
- Rent or property tax receipts.
- Working from home expenses. (T2200) work from home form
Home office square footage / total square footage
 - Rent
 - Utilities and condo fees
 - Maintenance and repairs
 - Home internet and cellphone fees
 - Office supplies
 - If commission based: property tax, home insurance, lease of equipment

Students:

- T2202 university tuition form.
- Interest paid on student loans.



Self employed income and expenses:

- Sales
- Cost of goods sold (inventory purchased, inventory sold)
- Advertising expenses (promotions, online advertising, etc.).
- Meals and entertainment (client engagement, late night meals).
- Insurance (professional, business, liability).
- Interest on business loans.
- Business taxes, licenses, memberships.
- Office expenses (if you have a home office, see applications below)
 - Rent / mortgage interest payment.
 - Utility bills.
 - Maintenance (cleaning / repairs).
 - Home insurance.
 - Property tax.
 - Cellphone and internet cost.
 - Total square footage of home, and total square footage for office use.
- 7) Office stationery and supplies (pens, papers, etc.)
- 8) Professional fees (accounting, legal)
- 9) Management and administration fees (including all admin related fees (software, subscriptions, etc.).
- 10) Repairs and maintenance.
- 11) Salaries.
- 12) Travel expenses.
- 13) Automobile expenses:
 - Business kilometers driven and total kilometers driven in the year.
 - Fuel expense.
 - Lease cost or interest on debt financing.
 - License and registration.
 - Maintenance and repairs.
 - Car insurance.
- 14) Business assets
 - Business tools and equipment (total purchase price and date of purchase).

If you have any expenses or items not listed above, please let us know of your expenses.
Please also provide your Business Number + your HST number.