



# Better Business Books Inc.

## ACCOUNTING & INCOME TAX SPECIALISTS

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### Tax Preparation Checklist for Individuals (if applicable):

#### Personal Information:

- SIN #'s & Dates of Birth for you, your spouse, & dependents
- Banking Info if depositing your refund directly into your account (Mandatory as of April 2016)
- Installments Paid in Tax Year
- Rent/Property Taxes Paid in Tax Year
- Copies of last year's tax return for you & your spouse (helpful, but not required)

#### Income Information:

T Slips (i.e. T4's, T4E's, T4A's, T5's, T5007, T4AOAS, T4AP, T4RSP etc)  
Capital Gains (i.e. Stocks, Sale of a Property etc)  
Alimony Received  
Other:

#### Deductions:

RRSP's  
RPP Deductions  
Dues Paid  
Child Care (Daycare Expenses)  
Moving Expenses  
Alimony Paid  
Carrying Charges  
Employment Expenses  
Non Capital Losses  
Other:

#### Non Refundable Tax Credits:

Public Transit Expenses  
New Home Buyers Credit (First Time Home Buyers)  
Adoption Expenses  
Disability Amount  
Student Loan Interest  
Tuition, Education (T2202A Tuition, Education and Textbook Amounts Certificate)  
Medical Expenses  
Donations & Gifts  
Other: