

Aide Memoire for your income tax returns

We recommend that you check the items that apply to you and the gather the relevant documents before beginning your tax return or before talking with your tax preparer.

Importants documents

- Notices of Assessment from previous tax year, (federal and QC)
- Tax instalments

For your income (as appropriate)

- Wages (T4 and RL-1)
- Business or Professional income (T5013 and RL-15)
 - Commissions received
 - Tips
- ➔ If you are self-employed or have a small unincorporated business, ask what documentation is required.
- Wage-loss indemnity received
- CSST / WSIB
- Canada Pension Plan (CPP) or Québec pension plan (RRQ/QPP)
- Old Age Security (T4OAS)
- Scholarships, RESP, LLP
- RRIF / LIF (T4RIF's)
- Pension fund (RPP)
- Withdrawals (RRSP, HBP)
- Other pensions (T4A's)
- Employment insurance (T4E's)
- Social assistance payments
- Compensation from SAAQ
- Taxable benefits (stock options) (T4PS)
- Interest Accrued (T5's)
- Dividends (T3's and T5's)
- Savings bonds
- Other investment income
- Captital gains or losses (T5008's)
- Quebec Parental Insurance Plan (QPIP) (RL-6)
- Early Repayment (received care expenses, bonus at work, home maintenance)
- Support payments
- Rental property or rental income
- Universal Child Care Benefit (UCCB)
- Ownership of foreign property which exceeds \$100,000
- Other income, specify

For your deductions and credits (if you qualify)

- Medical, dental, glasses, braces, care fees, etc
→ Also, travel distances if your meeting is over 40km from your home
- Premiums for travel insurance
- What is your drug coverage :
 - () Québec prescription drug insurance plan (RAMQ)
 - () Private drug insurance
- RRSP (must include first 60 days of current year even if you do not intend to claim them)
- HBP or LLP to reimburse
- Charitable donations and donations-in-kind (ie. Stocks)
- Child Care expenses (RL-24's & RL-30's)
- Summer Camp
- Child Care at your home
- Adoption fees
- Infertility treatments (medical)
- Tuition fees (T2202A, RL-8, or others for yourself and/or children)
- Court fees (initial fees, payments) for support payments
- Support payments paid
- Moving Expenses
- Home Renovation Tax Credit
- Financial expenses and interest paid (for investment income)
- Interest paid on a student loan
- Tax shelters
- Investments in a labor-sponsored fund
- Capital - regional et cooperative Desjardins shares
- Property tax or rent paid during the year and RL-31's
- All donation receipts including to political parties
- Return of amounts received in excess
- Expenditures related to employment
- Employment expenses for a business person
- Union dues and/or professional fees
- Tax credit for home-support services (70 years and over)
- Public transit amounts for tax credit
- Children's fitness receipts (under age 16 at beginning of the year)
- Children's artistic activities receipts (under age 16 at beginning of the year)
- Disability tax credit
- Do you qualify for Family Caregiver Amount
- Tax credit for caregivers
- Tax credit for a top-level athletes
- Apprenticeship job creation tax credit
- Tax credit for recent graduates working in remote resource regions
- Tax credit for volunteer respite services
- Other deductions or credits, specify
- If you are 65 years or older, owner of your house more than 15 years, you could receive a tax credit (need your home tax statement) (for QC tax returns)
- Conditions of Employment from employer (T2200)

Important Informations

Your name: _____

Spouse if applicable: _____

Address: _____

E-mail : _____ Phone : _____

*** Social Insurance Number: Remember to include this information for the person who will do your tax return.*

Civil Status: (Married, Common Law, Divorced, Single, Separated, Widowed)

Common Law : Since when have you lived at your current address
Date: _____

If you moved during the tax year, what was the date of your move?
Date : _____

Has your marital status changed in the year?
If yes, as of what date? _____

Does your spouse have any income?
If yes, is his or her tax return prepared by the same tax preparer?
If no, put down his/her net income from:
Federal (line 236) _____ Provincial (line 275, QC) _____

Do you have any dependant children?

➔ If yes, please provide their names (first and last), dates of birth, S.I.N. and income in the tax year.

Childrens :

First name : _____ Name : _____

SIN : _____ Birth date: ____/____/____ Income : _____

First name : _____ Name : _____

SIN : _____ Birth date: ____/____/____ Income : _____

First name : _____ Name : _____

SIN : _____ Birth date: ____/____/____ Income : _____

First name : _____ Name : _____

SIN : _____ Birth date: ____ / ____ / ____ Income : _____

First name : _____ Name : _____

SIN : _____ Birth date: ____ / ____ / ____ Income : _____

First name : _____ Name : _____

SIN : _____ Birth date: ____ / ____ / ____ Income : _____

Important note:

Do not detach or separate copies of T3, T4, T5, etc.
You must report your income from all sources, domestic and foreign.

Need help?: Gerald at 877 620 2256, gdesjardins@peakgroup.com
 Peter at 855-620-2256, pdstewart@peakgroup.com
 Michel at 888 620 2256, mjorg@peakgroup.com