



MINTOSH | NORTON | WILLIAMS
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2009 Personal Income Tax Checklist

INCOME

- All tax information slips (T-slips)
- [Self-employment information](#) (Business revenue and expenses)
- [Rental property information](#) (Rental revenue and property expenses)
- [Alimony/Child support](#) (Received)
- [Capital gains/losses](#) (Need proceeds from sale and original cost)
- Other income not reported on T-slips (ie. Foreign income, tips etc)
- [Universal Child Care Benefits](#) (Form RC62)

DEDUCTIONS AND TAX CREDITS

- [RRSP](#) Contribution receipts
- [Union or professional dues](#)
- [Interest on money borrowed to purchase investments and investment management fees](#)
- [Interest paid on student loans](#)
- [Tradesperson tool expenses](#)
- [Disability Support expenses](#)
- [Disability tax credit](#) – please advise us of any disabilities for you, your spouse or dependants
- [Safety deposit box fees](#)
- [Alimony/Child support paid](#)
- [Adoption expenses](#)
- [Tuition fees](#) (for self or dependant)
- [Moving expenses](#)
- [Employment expenses](#) (including form T2200 signed by employer)
- [Child care expenses](#) and [Child fitness receipts](#) (including [registration with Scouts Canada](#))
- [Legal expenses](#)
- [Charitable Donations](#) and Political Contributions
- [Medical expenses](#) (including dental work, prescription eyewear, travel medical insurance, [travel expenses](#) etc)
- [Public transit tax credit](#)



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OTHER ITEMS

- [Tax Installments](#) paid for 2009
- Any changes to personal profile: Marital status, Dependants, Address & phone number (Please ensure that we have record of all your dependants)
- [Province of residence](#) on December 31, 2009
- [Home Buyer Plan](#) and/or [Life Learning Plan](#) repayment schedule
- Details on [foreign property](#) owned at any time in 2009
- Personal Income Tax Notice of assessment from 2008
- [Direct deposit](#) information
- GST return to file

NEW ITEMS FOR 2009

- [Home renovation tax credit](#) (receipts from eligible expenses dated between January 27, 2009 and February 1, 2010)
- [First Time Home Buyer tax credit](#)

IMPORTANT DATES

- March 1, 2010—last day to contribute to RRSP in order to deduct it on your 2009 tax return
- April 30, 2010—Tax balance due for 2009 tax return and filing due for most taxpayers
- June 15, 2010—Tax return filing due for self-employed taxpayers

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