



# 2018 Personal Income Tax Return Information

Use this list as a reference for documents you may need to provide for your return:

## Slips

- Employment income (T4)
- All other income information slips (T3, T4A, T4PS, T5, T5013, T5018)
- Old Age Security (T4A-OAS) and CPP benefits (T4A-P)
- Other pensions and annuities (T4A, T4RIF, T4RSP)
- Employment Insurance benefits (T4E)
- Social assistance and Workers' Compensation benefits (T5007)

## Other Income

- Other employment income not reported on slips, including tips
- Self-employment income: business/professional/commission/farming income AND business expenses
- Partnership income and expenses
- Rental income and expenses
- Alimony, separation allowances, child maintenance (only if taxable by court order)
- Scholarships, fellowships, and bursaries (T4A)
- Capital gains and losses realized (include annual trading summary and T5008)

## Foreign Income & Property

- Foreign income
- Foreign pensions
- Details of foreign property owned at any time including cash, stocks, trusts, partnerships, real estate, etc. if over CAD\$100,000 – excluding personal-use property

## Deductions

- Employment related expenses (T2200)
- Interest on money borrowed to purchase investments, investment counsel fees
- Moving expenses – including costs of maintaining a vacant former residence
- Alimony, separation allowances, child maintenance (only if deductible by court order)
- Registered Retirement Savings Plan (RRSP) contributions (including January/February 2018)
- Professional dues

## Tax Credits

- Tuition fees (T2202, TL11A, TL11D) for you or a dependant
- Charitable donations and political contributions
- Medical expenses for you or a family member
- Interest paid on qualifying student loans
- New Home Buyers' tax credit
- Volunteer Firefighter tax credit
- Teacher or Early Childhood Educator tax credit

## RRSP Plans

- Home Buyers' Plan withdrawal/repayment
- Lifelong Learning Plan repayment

## Dependants

- Child care expenses
- Adoption expenses

## Questions?

|            |              |               |              |            |              |
|------------|--------------|---------------|--------------|------------|--------------|
| Claresholm | 403.625.4448 | Fort Macleod  | 403.553.3355 | Lethbridge | 403.382.6800 |
| Milk River | 403.647.3662 | Pincher Creek | 403.627.5510 | Taber      | 403.223.0056 |
| Vauxhall   | 403.654.4060 |               |              |            |              |

Find more at [www.availcpa.com](http://www.availcpa.com)

Visit our website for extended office hours during tax season and additional copies of this checklist for family members and friends.

