

LLS Financial Services Inc.

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2009 TAX RETURN CHECKLIST

(PLEASE BE SURE TO BRING ALONG ANY OF THE FOLLOWING RECORDS WHEN YOU COME IN TO HAVE YOUR INCOME TAX PREPARED.)

Employment Income / Deductions

- Employment Income T4
- Employment Insurance T4E
- Employment Profit-Sharing T4PS
- Union/Professional Dues Receipts

Pension Income

- Old Age Security T4(OAS)
- CPP T4A(P)
- Pension T4A
- RRSP / RPP T4RSP
- RRIF T4RRIF

Investment Income / Deductions

- Interest T5/T600
- Dividends T5
- Trust Income T3
- Partnerships T101
- Tax Shelters T5013

Other Slips and Receipts

- Condition of Employment T2200
- Moving Expenses
- Medical Receipts
- Child Day Care Expense Receipts
(Include Name/address/Sin # of caregiver)
- Tuition T2202A
- Charitable Donation Receipts
- Support Expenses (spousal/child)
- Child Fitness Expense Receipts
- Rental Expense Receipts
- Student Loan Interest Receipts
- Political Donation Receipts
- Property Tax Receipt
- RRSP Contribution Receipts

Other Items to Consider

- Disposal of any Non-Registered Investments/Non Registered Mutual Funds/Real Estate
All trade transactions and monthly statements for the year. Be sure to include your December 31st Statement(s)
- Home Renovation Tax Credit – invoices and worksheet as provided on our web site
- Rental Income/Expenses – worksheet as provided on our web site
- Self Employment Income/Expenses – worksheet (2 pages) as provided on our web site

Please provide us with your most current Notice of Assessment from Canada Revenue Agency (CRA) or the following information.

- RRSP Contribution Room \$ _____
- Home Buyers Plan (HBP) Repayment \$ _____
- Life Learning Plan (LLP) Repayment \$ _____

Notes / Questions

Name: _____