



Personal Tax Checklist

INCOME

Personal

- T4, T4A – Salaries and Employment Income
- Other Employment Benefits
- T4A (P) – Canada Pension Plan Benefits
- T4A (OAS) – Old Age Security Benefits
- T4A – Other Pensions or Superannuation
- RC62 – Universal Child Care Benefit
- T4RSP – RRSP Income
- T4RIF – RRIF Income
- T4E – Employment Insurance Benefits
- T5007 – WCB Benefits / Social Services Benefits
- T1137 – Home Buyers Plan
- T4RCA – Retirement Income

Other

- Alimony Received
- Taxable Child Support Received
- Scholarships / Bursaries

Investment

- T3, T5, T4 – Interest and Dividends
- T5008 – Statement of Security Transactions
- T5018 Statement of Contract Payments
- Interest on Tax Refunds
- T3 – Mutual Fund Income
- Foreign Income
- Annuities
- Rental Income (Full Details Required)
- Summary of Investment Contract Holdings
- T5013 – Limited Partnership Income (Loss)
- Capital Gains / Losses (Full Details Required)

Business

- Self –Employment Earnings (Full Details Required)
- Self – Employed Commission Earnings (Full Details)
- Professional Earnings (Full Details Required)

DEDUCTIONS & CREDITS

Non – Refundable Credits

- Married Amount – Spouses Net Income \$ _____
- Equivalent to Married Amount (Full Details Required)
- Disability Deductions
- T2202 - Tuition Fees / Education Credit for Dependant
Dependants Net Income \$ _____
- Medical Receipts
- Charitable Donations
- Attendant Care Expenses
- Canada Caregiver credit
- First Time Home Buyer Receipts
- Adoption expenses
- Interest Paid on Student Loans

Other Items

- Political Contribution Receipts
- Capital Losses Carry Forward
- Non-Capital losses carry forward
- Restricted Farming Losses Carry Forward
- Dependant Data (GST Credit and Child Tax Benefit)
- T2200 – Declaration of Conditions of Employment
- Limited Partnership Losses of Other Years
- Prior year Notice of Assessment
- Instalment Payments for current year

Deductions

- RRSP Deductions
- Union / Professional Dues
- Alimony Paid
- Child Care Expenses
- Deductible Spouse / Child Support Paid
- Disability Support Expenses
- Interest and Carrying Charges on Investments
- Investment Counsel & Accounting Fees
- Employment Expenses (Full Details Required)
- TL2 – Claim for Board and Lodging
- Moving Expenses (Full Details Required)
- Allowable Business Investment Loss

- Details on Sale of principal residence
- Details on controlled foreign affiliates
- Details on Foreign Property held (CND \$ 100,000)
- Controlled and Non-controlled Foreign Affiliates
- Transfer of loans to Non-resident Trust
- Distributions fm & indebtedness to Non-resident Trust