



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
- 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
- Other - Specify

Investment

- T3, T5, T4)S – Interest and Dividends
- T5008 – Statement of Security Transactions
- Interest on Tax Refunds(s)
- T600 – Canada Savings Bonds
- 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 Information
- Farming / Fishing Earnings Information
- Professional Earnings Information
- Self – Employed Commission Earnings Information

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
- Limited Partnership Losses of Other Years
- Monthly Transit Passes
- Child Fitness Receipts

Other Items

- Political Contribution Receipts
- Capital Losses Carry Forward
- Allowable Business Investment Loss
- Employment Insurance Benefit Repayments
- Dependant Data (GST Credit and Child Tax Benefit)
- T2200 – Declaration of Conditions of Employment
- Loss Carry Forward Information

Other Deductions

- RRSP Deductions
- Union / Professional Dues
- Alimony Paid
- Deductible Child Support Paid
- Safety Deposit Box Charges
- Interest Paid on Student Loans
- Interest and Carrying Charges on Investments
- Investment Counsel & Accounting Fees
- Employment Expenses (Full Details Required)
- Deductible Legal Fees
- Child Care Expenses (Receipts Required)
- Moving Expenses (Full Details Required)
- TL2 – Claim for Board and Lodging

Expenses

- Restricted Farming Losses Carry Forward
- Prior year Notice of Assessment
- Instalment Payments for current year
- Details on Foreign Property held (CND \$ 100,000.00)
- Capital and Non-Capital losses carry forward