

## PERSONAL INCOME TAX CHECKLIST

### Personal Income Information

- Salaries and Employment Income - T4, T4A
- Other Employment Benefits or Income (tips etc.)
- CPP Benefits - T4A(P)
- Old Age Security Benefits - T4A(OAS)
- Other Pensions or Superannuation - T4A
- RRSP Income - T4RSP
- RRIF Income - T4RIF
- Employment Insurance - T4E (available online)
- WCB / Social Services Benefits - T5007
- Retirement Income - T4RCA

### Investment Income

- Interest and Dividends - T3, T5, T4PS
- Statement of Security Transactions - T5008
- Interest on Tax Refund (notice of assessment)
- Canada Savings Bonds - T600, T5
- Income from Mutual Funds - T3
- Foreign Income
- Annuities
- \*Rental Income (Full details required)
- \*Prepare Summary of Investment Contract Holdings
- Limited Partnership Income - T5013
- \*Capital Gains/Losses (Full details required)
- Bitcoin/CryptoCurrency transactions

### Non-Refundable Credits

- Tuition Fees / Education Credit - T2202 (note that T2202 forms commonly available online only)
- Tuition Fees / Education Credit for Child T2202 - Child's Net income: \$ \_\_\_\_\_
- Married -spouse's Net Income: \$ \_\_\_\_\_
- Other Dependants Amount (Details required)
- Disability Deductions - T2201
- Medical Receipts (include private/group plan premiums/ attendant care expenses)
- Volunteer Firefighters and Search and Rescue amount
- Charitable Donations
- Political Contribution Receipts
- Dependent Changes (GST Credit & Child Tax Benefit)
- New baby or adoption in tax year
- First time home buyer
- Renovation for home accessibility
- School teacher supply credit

### Other Deductions

- RRSP receipts (include contributions to Mar 1, 2022)
- Union / Professional Dues
- Spousal Support Paid (details of changes / court order)
- Interest and Carrying Charges on Investments
- Interest Paid on Student Loans
- Investment Counsel and Accounting Fees
- \*Employee Expenses - see separate worksheet
- Deductible Legal Fees (Fees to collect income)
- Declaration of Condition of Employment-T2200
- Claim for Board & Lodging Expenses – TL2
- Child Care Expenses (Full details/receipts required)
- Moving Expenses T1M (Full details required)
- Employment Insurance Repayments
- Allowable Business Investment Loss
- Canadian Forces or Police Deduction
- Losses Carried Forward
- Donations Carried Forward
- Non-deducted RRSP Carried Forward Installments

### Other Income

- Alimony (details of changes / court order)
  - Scholarships/Bursaries T4A
  - Other – Specify
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### Other Information

- Last year's Notice of Assessment - new clients only
- Withdrawal from RRSP for Home Buyers Plan or Life Long Learning Plan
- Foreign property and investments owned (full details required) Total cost exceeding \$100,000
- Are you a US citizen?

### Principal Residence Sale (Must be reported starting 2016)

- Purchase Statement of Adjustments
- Sale Statement of Adjustments

### Business Income

- Self-employed Earnings Information- see separate worksheet
- Vehicle expenses and KM's used
- Office in Home information
- GST return for proprietorship or partnership