

Personal Tax Checklist

Don't forget to report all income.

Forgetting to include income can be a costly mistake.

Here is a sample of income items you should be sure to include.

Income

- ☐ T4 slips (employment income)
- ☐ Self-employment income and expenses
- ☐ Farm or fishing income and expenses
- ☐ Rental income and expenses
- ☐ T3 slips (investment income)
- ☐ T5 slips (investment income)
- ☐ T5008 (statement of securities transactions/investment gain or loss)
- ☐ Non-registered investment gains and/or losses
- ☐ T4A (other pensions, scholarships and annuities)
- ☐ T4AOAS (statement of old age security income)
- ☐ T4AP (statement of Canada Pension plan income)
- ☐ T4E (employment insurance income)
- ☐ T4RSP (RRSP income)
- ☐ T4RIF (RIF income)
- ☐ T5013 (partnership income)
- ☐ T5007 (social assistance payments, worksafe compensation)
- ☐ Other income not reported on a slip (tips)
- ☐ Spousal support payments received
- ☐ Home buyers amount and repayment amount
- ☐ Information on primary residence sold
- ☐ Information on other property disposed, including rental property
- ☐ Prior year tax return and notice of assessment (new clients only)

Other items, including deductions and credits

Deductions and credits help reduce your taxes owing.

Here is a sample of some items that can help you save money.

Receipts and other information

- ☐ RRSP contribution slips
- ☐ T2200 (eligible employment expenses - signed by employer)
- ☐ T2202A (tuition slips)
- ☐ Teacher school supplies
- ☐ Moving expenses (for employment or schooling)
- ☐ Medical receipts (including annual premiums paid)
- ☐ Charitable donation receipts
- ☐ Political donation receipts
- ☐ Child care expenses
- ☐ Adoption expenses
- ☐ Spousal support payments (child support is not deductible)
- ☐ Office in-home expenses (applicable for self employed)
- ☐ Tool expenses (for tradesperson)
- ☐ Professional or union dues
- ☐ Investment council fees
- ☐ Interest paid on investment borrowing
- ☐ Digital news subscription expenses
- ☐ Home accessibility expenses
- ☐ Volunteer firefighter certification
- ☐ Auto/travel logbook and expenses
- ☐ TL2 form for transport drivers - signed by employer
- ☐ Tax installments paid