

Personal Income Tax Checklist



1. A copy of your most recent Notice of Assessment. ☐
2. Details of any changes in address, marital status, number of dependents or employment status.
(include Social Insurance Number of a new partner, if applicable) ☐
3. Details of income from all sources:
 - Income from all employment (T4)
 - Income from commissions, training allowances, tips, etc. (T4A)
 - Pension income (T4A, T4RIF, T4 RSP, T4A(OAS), and T4A(P) slips)
 - Scholarships, fellowships, and/or bursaries received (T4A)
 - Employment Insurance benefits (T4E slip)
 - WCB or social assistance benefits (T5007)
 - Dividends, interest and other investment income (T3 and T5 slips, etc.)
 - Rental income - details of any properties acquired and rents received and expenses paid
 - Capital gains or losses - full details of all capital properties (stocks, bonds, real estate, etc.) sold or given away, including sale proceeds, original purchase costs and statement of adjustments
 - Income from self-employment sources, including full detail of income and expense
 - Spousal or Child support payments received (please submit court order or written agreement)
 - Cryptocurrency income (ie. Bitcoin) including sales proceeds and purchase costs
 - Details of any other income
4. Details of deductions from income including:
 - Expenses of earning commission or employment income (including Form T2200 signed by your employer)
 - R.R.S.P. contribution receipts
 - First Home Savings Account (FHSA) contribution receipts
 - Union or professional dues, if not included on your T4 (receipts required)
 - Receipts for child care expenses (include name, address, social insurance number and amounts paid)
 - Details of any allowable business investment losses (loss on shares/debt of a Canadian controlled private corporation - include proof of loss).
 - Investments - interest paid from money borrowed to purchase investments; management and other related fees
 - Employment insurance benefits repaid (slip required)
 - Spousal or Child support expenses paid. Please submit a court order or written agreement, along with the name, address, and social insurance number (SIN) of the person to whom it is being paid. (if not previously submitted)
 - Moving expenses
 - Other deductions
5. Details of allowable amounts for tax credits:
 - Tuition fees paid (receipts required - T2202 or T2202A) - have slip signed by student if it may be transferrable to parent/grandparent
 - Interest paid on qualifying student loans
 - Details regarding a disability claim for yourself, your spouse or your dependent(s), such as a Disability Certificate
 - Medical expenses (receipts paid during the current year, and unclaimed receipts from the previous year)
 - Charitable donations receipts (with "official receipt for income tax purposes" only included on receipt - pledge receipts are not accepted)
 - First Time Home Buyers Tax Credit - if you purchased your first home this year
 - Political party contribution receipts
 - Receipts for school supplies purchased for your classroom if you are a teacher
 - Receipts for home renovations done to improve the accessibility for a senior or an individual with a disability
 - ITA transcripts if you are an apprentice enrolled in a program administered by the ITA
 - Receipts for digital news subscriptions from Canadian journalism organizations
6. Summary of income tax instalments paid this year. ☐
7. Did you sell your principal residence this year? If so, please provide the date of acquisition, proceeds from the sale, and the address of the property.

Y	N
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9. Did you own or hold foreign property (including offshore mutual funds) at any time this year with a total cost of more than \$100,000? Contact our office if unsure.

Y	N
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