

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
- b. 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
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