

## INCOME TAX

## PERSONAL CHECKLIST



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Documents you may need for your Personal Tax Return:

1. Prior Year's Notice of Assessment
2. For new clients, a copy of your last filed tax return
3. T Slips. These can include: T4s for employment income, T3s for trust distributions and T5s for investment income, etc.
4. Government benefit slips: T4E, T4A(P), T4A(OAS), etc.
5. Donation Receipts
6. RRSP Slips. Your RRSP slips should cover March of last year through to February of this year
7. Medical Receipts
8. Childcare Receipts
9. Transit Pass Costs
10. Capital Gains / Losses. You will need information such as the year and price of purchase and sale for self-directed investments. Your investment advisor/company should provide you with any T-slips generated, including a T5008 Statement of Securities Transactions
11. Interest on money borrowed to invest or management fees on investments.
12. Other Investments
13. Work from Home - Home Office Expenses
14. Employment Expenses – These include the T2200 and T2200S Declaration of Conditions of Employment and Expense Totals
15. Education Amounts – This includes the T2202 Education Amount Certificate
16. Business Income & Expenses / Statement of Business or Professional Activities
17. Rental Income & Expenses / Statement of Real Estate Rentals
18. First Time Home Buyer documents
19. Property Taxes Paid or Rent Receipts for the year
20. Did you make installment payments for the year? If so, please provide amount.
21. Did you sell your principal residence this tax year? Purchase price, year & sale price must be disclosed.

\*Please note that these are just the basic documents required from the general individual taxpayer. Depending on what type of financial transactions you were involved in last year or what your status is (single, married, with children, etc.), the CRA may need additional documents and information from you, to process your tax return.

Providing comprehensive business services and consulting solutions.  
Our team specializes in business, accounting, taxation and ongoing operations support.