

PERSONAL INCOME TAX CHECKLIST

Here is a checklist to assist you in identifying the documents required for preparation of your income tax return.

Please indicate [X] if applicable to you	Please Provide	
Employment Income		
<input type="checkbox"/>	Employment (including retiring allowances)	T4 and/or T4A slips
<input type="checkbox"/>	Odd jobs, tips	Pay slips, or other documents supporting amounts
<input type="checkbox"/>	Director's fees	Payment slips or deposit slips
<input type="checkbox"/>	Profit sharing income	T4PS slip
<input type="checkbox"/>	Loans from employer	Amount, interest rate, and terms of repayment
Pension, Retirement, Annuity Income		
<input type="checkbox"/>	Old Age Security	T4A (OAS)
<input type="checkbox"/>	Canada or Quebec Pension Plan (CPP)	T4A(P)
<input type="checkbox"/>	Foreign (eg. U.S. Social Security)	Foreign income slips or filed US tax returns
<input type="checkbox"/>	Registered Retirement Income Fund	T4RIF
<input type="checkbox"/>	Withdrawal from a RRSP	T4RSP slips
<input type="checkbox"/>	Any other pension plan contributions and withdrawals (including withdrawals and repayments for the Home Buyers Plan and Life Long Learning Plan)	
<input type="checkbox"/>	Annuity Payments	T-slips
Investment Income		
<input type="checkbox"/>	Interest - savings account	T5 slips
<input type="checkbox"/>	Term deposits or G.I.C.'s	T5 slips
<input type="checkbox"/>	Mutual fund investment income	T3 slips
<input type="checkbox"/>	Dividends - Canadian corporations	T5 slips
<input type="checkbox"/>	Interest - Canada Savings Bonds	T5, T600 or T600C slips, details of interest earned if no slips
<input type="checkbox"/>	Interest - joint account with spouse	Percentage of split
<input type="checkbox"/>	Interest - mortgage or other loans	Amortization schedule, summary of interest income earned
<input type="checkbox"/>	Foreign interest or dividends	Foreign slips or filed US tax returns
<input type="checkbox"/>	Interest - Treasury bills	T5 slips
<input type="checkbox"/>	Royalty or other investment income	T5 or T3 slips
<input type="checkbox"/>	Partnership income	T5013
Sale / Exchange of Investments		
<input type="checkbox"/>	Stocks, bonds, trust units	Capital gain and loss report from your broker or bank
<input type="checkbox"/>	Real estate and other properties	Sale documents and original purchase documents
<input type="checkbox"/>	Any properties gifted to others	Amount gifted, who they were gifted to, name(s) and address(es)
<input type="checkbox"/>	Bitcoin or other cryptocurrency transactions	Proceeds of sale and summary of purchase transactions (cost base)
Income from Self Employment / Sole Proprietorship		
<input type="checkbox"/>	Revenue & expenses	Record of all revenues & expenses; we can provide a schedule of allowable expenses or you can look online for T2125.
<input type="checkbox"/>	Assets purchased / sold during year	Dates, original cost base, proceeds of disposition, commission fees, and legal fees
<input type="checkbox"/>	Any partners in self-employed income	Name(s), SIN and share (percentage of partnership)
<input type="checkbox"/>	Salary paid to spouse	Details of work done and total amount paid
<input type="checkbox"/>	Inventory	Cost of closing inventory
<input type="checkbox"/>	Accounts receivable and accounts payable	Listing of each

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<input type="checkbox"/>	Home-office	Square footage of office and total home, and home expense details/amounts such as utilities, property taxes, insurance, rent and mortgage interest. If you need a spreadsheet to document your information, please contact us.
Sale of Principal Residence / House		
<input type="checkbox"/>	Real estate and other properties (including principal residence)	Please provide the proceeds of disposition, a description of the property, and the year the property was acquired.
Rental Income		
<input type="checkbox"/>	Rental income & expense	Details of all revenue & expenses; if you require a list of deductible expenses we can provide you with this, or you can download the T776 from the CRA website.
<input type="checkbox"/>	New properties	Purchase agreement
<input type="checkbox"/>	Rental of part of residence	Details of split
<input type="checkbox"/>	Change of use of rental property	Date of change in-use, appraised value on that date
<input type="checkbox"/>	Sale of rental property	Sale documents and original purchase documents
Other Income		
<input type="checkbox"/>	Employment Insurance Benefits	T4E slip
<input type="checkbox"/>	WCB benefits	T4, T5007, details
<input type="checkbox"/>	Social assistance payments	Amounts received and/or any T-slips received
<input type="checkbox"/>	Alimony or child support received	Separation agreement, stating amounts paid in 2018
<input type="checkbox"/>	Scholarships, bursaries	T4A slip(s)
Employment Related Expenses		
<input type="checkbox"/>	Declaration of conditions of employment	Form T2200 signed by employer
<input type="checkbox"/>	Home Office	If you receive a T2200 from your employer you can deduct a portion of your home expenses including utilities and rent. Please provide the details of your expenses plus the square footage of your office and total square footage of your home.
<input type="checkbox"/>	Travel/Auto	Records of expenses and calculation of business mileage
<input type="checkbox"/>	Moving expenses	Receipts from the move, a letter from the employer stating move was required for employment
<input type="checkbox"/>	Cell phone	Summary of cell phone charges for employment
<input type="checkbox"/>	Union or Association Dues	Official tax receipts
Commission Related Expenses		
<input type="checkbox"/>	Home-office	Form T2200 & details of area used and (Note: Mortgage interest is not deductible as an employment expense)
<input type="checkbox"/>	Travel/Auto	Summary of expenses and calculation of business portion of use
<input type="checkbox"/>	Sales expenses	Summary of expenses
Investment Expenses		
<input type="checkbox"/>	Borrow money to earn invest. income	Summary of interest related to investments
<input type="checkbox"/>	Borrowed on margin account (stocks)	Summary of interest paid related to the account
<input type="checkbox"/>	Accounting fees to record income	Invoices relating to the expense
<input type="checkbox"/>	Investment counsel and investment management fees	Invoices or summary of fees
<input type="checkbox"/>	Tax shelters	Purchase documents
Other Deductions and Credits		
<input type="checkbox"/>	Alimony or separation allowance paid	Record of payment & details
<input type="checkbox"/>	Professional dues	Name of organization, amount of dues, date of payment
<input type="checkbox"/>	Tuition fees over \$100 paid (post-	Forms T2202, TL11A, B, C, and D where applicable

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	secondary)	
<input type="checkbox"/>	Interest paid on qualifying student loans	Statement indicating interest amount
<input type="checkbox"/>	Registered Retirement Savings Plan	Official RRSP contribution tax receipt
<input type="checkbox"/>	Stocks/bonds rolled over into RRSP	Official RRSP contribution tax receipt, details
<input type="checkbox"/>	Donations to registered charities	Official donation tax receipts from the charity
<input type="checkbox"/>	Unused prior year donations	Included on prior year tax return
<input type="checkbox"/>	Amounts paid for child care	Details of payments for each child
<input type="checkbox"/>	Medical Expenses, (only if in excess of the lessor of 3% of net Income or \$2,302)	Receipts, itemized details
<input type="checkbox"/>	Political Contributions paid	Official tax receipts
<input type="checkbox"/>	Loss on shares of or loss on loans to a private company	Proceeds of disposition and original cost of investment
<input type="checkbox"/>	Self or dependant attend University	Form T2202 or T2202A signed T2202 by dependant if tuition amount is transferred from dependant to the parent
<input type="checkbox"/>	Disability Credit	Form T2201 (first year) As of March 22, 2017, nurse practitioners have been added to the list of medical practitioners who may certify eligibility of a person for the DTC.
<input type="checkbox"/>	Incurred disability support costs	Full details, Form T929 - (speech, sight, hearing, learning aids for impaired individuals and attendant care expenses)
<input type="checkbox"/>	Contribute to support of relative	Details of the relationship status and payments of supporting amount
<input type="checkbox"/>	Parent or parents (over 65) live with you	As of 2017, caregiver amount is not available for non-infirm seniors who reside with their adult children or grandchildren.
<input type="checkbox"/>	Non-resident dependants supported	Payments to non-resident dependants and summary of their global income.
<input type="checkbox"/>	Oil & Gas, Mining investments	Investment statements or agreement. T-slips or payments from Oil & Gas, Mining companies
<input type="checkbox"/>	Canadian Feature Films, Videos	Completed form T1131
<input type="checkbox"/>	Scientific research and experimental development (SRED) expenses	Details of your SR&ED expenditures and investment tax credit
<input type="checkbox"/>	Tools acquired by tradespersons and eligible apprentice mechanics	Total cost of eligible tools that you bought in 2023 and income from employment as a tradesperson for the year
<input type="checkbox"/>	Adoption expenses	A copy of the adoption order and a form of the adoption expense
<input type="checkbox"/>	Canada Caregiver Amount	T2201 (Disability Tax Credit Certificate)
<input type="checkbox"/>	First-Time Home Buyer's Tax Credit (HBTC)	First-time home buyers who acquire a qualifying home can claim a non-refundable tax credit. Please indicate whether you are a first-time home buyer.
<input type="checkbox"/>	Home accessibility tax credit	Certain expenditures (up to \$20,000) may be eligible for a tax credit if made in relation to a renovation or alteration of your home to enhance mobility or reduce the risk of harm for an individual who is either, eligible for the Disability Tax Credit, or 65 years of age or older at December 31, 2023
<input type="checkbox"/>	Eligible Educator School Supply Tax Credit	If you are a teacher or early childhood educator, please provide receipts (up to \$1,000) for eligible school supplies purchased in the year.