



T1 Checklist

General Information: is there anything below that we need to be aware of in the past year?

- Have you moved? If so what is your new address, and do you have the corresponding paperwork for the sale of your old residence? (if applicable)
- Has your marital status changed? If so, please provide details on how
- Did you have another child? If so what is their name, date of birth, and SIN

Paperwork to bring in: only commonly used are listed, if you are issued any other slip(s) please bring them in *(please check the box if you've provided each slip)*

- T3 – statement of trust income
- T4 – statement of employment income
 - T4A – statement of pension, retirement and other (i.e. severance)
 - T4E – statement of employment insurance (if you have received EI benefits)
 - T4 OAS – statement of old age security payments
 - T4 AP – statement of Canada Pension Plan benefits
- T5 – statement of investments (interest income)
- T2200 signed by employer – Employment expenses summary with receipts and mileage
- T2202A – Statement of tuition paid (issued by your college or university)
 - Interest portion on repayment of student loans
- T5007 – statement of social assistance or workers compensation benefits
- Medical expenses – please contact your pharmacies and health care provider(s) to get a statement for January – December
- Charitable Donation and Political Contribution slips
- Final copy of property tax bill or residential rent receipt; whichever is applicable
- Spousal support amounts paid out / received
- RRSP / RRIF contributions and/or withdrawals
- Union and professional dues paid
- Did you receive income from another country (i.e. pension, investments, rental)
- Business income – for sole proprietorships and partnerships (includes rental properties)
 - Total income
 - Gas receipts or mileage log
 - Related expenses (with the receipts)
 - Home utility bills
 - Telephone and internet bills
- Moving expenses – if you moved more than 40km for work or schooling purposes

Do you authorize Huron Tax Consultants to be able to view your CRA online account? If yes, please ask for an authorization slip, or see the link on our website.

Miscellaneous:

- If you're over 65 do you elect to pension splitting? Y / N
- Did you pay any installments in this past year? Please provide the date and the amount of each installment.
- Do you have any adopted children? Eligible expenses to claim include fees paid to agencies, travel expenses to visit your child and immigration expenses to bring the child home.
- Do you have a dual citizenship between Canada and the United States?
- Were you a first time home buyer this year?
- Are you a volunteer fire fighter?
- Did a parent move in with you for care?