



Income Tax Checklist 个人报税清单

Personal Information 个人信息

- ☐ Social Insurance Number (SIN)
- ☐ Date of birth
- ☐ Information about spouse/common-law partner
- ☐ Information about dependents
- ☐ Spouse and/or child net income amounts
- ☐ Tuition transfer amount from spouse or child
- ☐ Last year's tax return
- ☐ Notice of Assessment from last year's return
- ☐ Total amount of instalment payments made to the CRA
- ☐ Other CRA correspondence

Income 收入

- ☐ Employment income (T4)
- ☐ Self-employed business income (T2125, T5013, T4A)
- ☐ Interest, dividends, mutual funds (T3, T5, T5008)
- ☐ Rental income and expenses (T776)
- ☐ Old Age Security and CPP benefits (T4A-OAS, T4A-P)
- ☐ Pension and annuity income (T4A)
- ☐ RRSP and RIF income (T4RSP, T4RIF)
- ☐ Employment insurance benefits (T4E)
- ☐ Social assistance payments (T5007)
- ☐ Workers' compensation benefits (T5007)
- ☐ Other income not reported on a slip (e.g. tips)
- ☐ RL-1 Employment and other income (QC only)

Other Information 其他信息

- ☐ Sale of principal residence
- ☐ Sale or deemed sale of stocks, bonds or real estate
- ☐ RRSP deduction limit and unused amounts
- ☐ Tuition carry forward amounts
- ☐ Loss carry forward amounts
- ☐ Other carry forward amounts (donations, etc.)

Receipts 收据

- ☐ RRSP contributions
- ☐ Employment expenses (T2200 signed by employer)
- ☐ Tool expenses
- ☐ Union dues not included on your T4 slip
- ☐ Exams for professional certification
- ☐ Teacher's school supplies
- ☐ Childcare expenses
- ☐ Support payments paid or received
- ☐ Adoption expenses
- ☐ Disability tax credit for self or dependents
- ☐ Medical expenses
- ☐ Personal attendant/facility care expenses
- ☐ Charitable donations
- ☐ Northern residents deduction
- ☐ Digital News subscription expenses
- ☐ Political contributions
- ☐ Moving expenses
- ☐ Home accessibility expenses
- ☐ Home Buyers' Amount
- ☐ Tuition expenses
- ☐ Student loan interest amounts
- ☐ Tax-exempt scholarships