



Chartered Professional Accountant

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Personal Tax Documents Checklist

This checklist will help you maximize the benefit of your accounting services. Please provide:

T – Slips (Income)	Deductions / Write-Offs
T3 – Statement of Trust Income	T2200 – Required for Employment Expenses
T4 – Employment Income Slips	Employment Expenses / Excel Summary
T4A – Other Income / Subcontractor Income	Tool Expenses for Tradespersons: Listed & Signed by Employer Please
T4A(OAS) / T4A(P) – Government Pension Slips	ITA Transcript (Apprentices)
T4E – Employment Insurance (EI) Benefits	Labour Mobility Deduction (Tradespersons)
T5 – Statement of Investment Income	Professional / Union Due Receipts
T5008 – Statement of Securities Transactions	RRSP Contribution Receipts - March of Last Year to February of This Year
T5013 – Statement of Partnership Income	Child Care / Adoption Expenses
T5018 – Statement of Contract Payments	Registered Charity / Political Donations
	Moving Expenses
Other Income	T2202A – Tuition Tax Form (Signed)
Rental Income / Expenses / Excel Summary	T111A – Foreign Tuition Tax Form
Business Income / Expenses / Excel Summary	Interest Paid on Eligible Student Loans
Sale of Investment / Stock Documents	Exam Costs for Professional Certifications
Original Purchase & Sale ‘Statement of Adjustments’ for Real Estate Transactions	Northern Residence Deduction (Location / Days Spent / Trip Details / Cost)
Spousal Support Income Received (Added Up)	School Teacher Expenses & Supplies
	Spousal Support Payments Made (Added Up)
Other Items	Interest / Broker Costs for Investments
Tips Received or Estimated (for Servers / Etc.)	Medical Expense Excel Summary
Separation / Divorce Agreement (within 2 years)	Seniors (Over 65) Home Renovation Costs (Undertaken for Mobility Reasons)
Prior Year Income Tax Return (New Clients Only)	Multigenerational Home Renovation Costs
Getting Services Started	
Step 1: Intake (New Clients) or Update (Returning Clients) Form Completed	
Step 2: Provide Your Documents (see above) - Options Listed Here	

What we don't need:

- Canada Groceries Benefit Statements (these payments are non-taxable)
- Registered Investment Statements for RRSPs, TFSA, RRIFs, or RESPs (annual growth not taxed)
- School activity fees and busing fees for your children (these are not tax deductible – sorry)
- Fitness / art activity costs for your children (not deductible – sorry)
- Tuition & textbook receipts or cost summaries (only deductible via T2202A / T111A Tax Form)

Deadline Reminder:

- Start your taxes in March for better services. Information dropped off within 2 weeks of your tax deadline is not guaranteed to be filed on time. Most taxpayers need to submit by April 30th.

* [Helping our clients thrive through excellent accounting, tax, and mentorship solutions.](#) *