

Personal Income Tax Checklist



1. Personal Information

- ☐ Full name
- ☐ Address
- ☐ Phone number
- ☐ Email address
- ☐ Social Insurance Number
- ☐ Date of Birth
- ☐ Marital status as of December 31 of the current year and the date it changed.
- ☐ Dependants/Spouse (Same information provided as above)

2. Income Information

- ☐ T4 Slips- Employment Income
- ☐ T4E- Employment Insurance and other benefits
- ☐ T4A- Pension, retirement, annuity, and other income
- ☐ T4A (OAS)- Old Age Security and Canada Pension Plan
- ☐ T4RSP/T4RIF- RRSP and RIF income
- ☐ T3/T5/T5008- Investment Income
- ☐ T5007- Social Assistance and Workers Compensation
- ☐ Summary of rental income
- ☐ Summary of business income

3. Deductions

- ☐ RRSP Contribution Slips- Made by February 28
- ☐ Charitable Donations- official receipts
- ☐ Political Donations- official receipts
- ☐ Medical Expense summary- retain receipts
- ☐ Medical premiums paid for health insurance plans
- ☐ T2200- Employment Expenses (Prepared by employer)
- ☐ Student loan interest
- ☐ Childcare expenses
- ☐ Adoption expenses
- ☐ Professional or union dues (if not included on the T4)
- ☐ School supply expenses- teachers only
- ☐ Tool expenses- trades persons for work (Include all receipts)
- ☐ Legal expenses to collect spousal support, pension or retiring allowance
- ☐ Investment advisor fees and interest expenses on **non-registered investments**
- ☐ Home office expenses if working from home (include square feet of office and entire home)
- ☐ Moving Expenses if you moved over 40kms for work or school

4. Credits

- ☐ Children's fitness and art/cultural tax credits
- ☐ Tuition and Education expenses- a T2202A or TL11 will be required
- ☐ First Time Home Buyer- include proof of purchase
- ☐ Home Accessibility Tax Credits
- ☐ Disability Tax Credit
- ☐ Canada Caregiver Tax Credit
- ☐ Primary Caregiver Tax Credit (name of care recipient and hours of care given)
- ☐ Renters affordability Tax Credit (Rent paid for the year total and to whom it was paid)
- ☐ Homeowners affordability tax credit- include property tax bill



5. Tax Documents

- ☐ Provide previous years Notice of Assessment
- ☐ Any Correspondence from Canada Revenue Agency
- ☐ Summary of any instalment payments made for the tax year
- ☐ Copy of previous years tax return- NEW CLIENTS ONLY

6. Other Information

- ☐ Declaration of foreign property valued over \$100,000.00. Including investments in foreign shares. (Excludes personal use properties.)
- ☐ Sale of capital property. Documents to provide are the sale agreement, and original purchase date and cost, any costs to sell the property
- ☐ Did you sell your home/cottage? A Principal Residence Election is needed. Including sale price, address and year property was originally acquired.

The above list is not all inclusive. The above checklist is a general guideline for preparing your personal income tax package for drop off. There may be other items your accountant requires from you depending on your personal situation.

If you have questions about preparing your income tax package for drop off, please contact our office at 204-954-9690 or email us at reception@fplsaccounting.ca