



## PERSONAL TAX (EMPLOYEES & FAMILIES) CHECKLIST I CANADA

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# Personal Tax Checklist I Canada – Employees & Families

Looking for a complete personal tax checklist in Canada?

This guide helps employees and families prepare all required documents for accurate and timely tax filing. Use this checklist to gather your T-slips, deductions, credits, and family information before submitting your documents.

## A. Identification & Tax Status Information

Provide the following personal details required for CRA filing:

- Full Legal Name
- Social Insurance Number (SIN)
- Date of Birth
- Marital Status (as of December 31 of the tax year)
- Spouse / Common-Law Partner SIN and Net Income
- Current Residential Address
- Province of Residence on December 31
- Direct Deposit Banking Information
- Copy of Last Notice of Assessment (if available)

## B. Employment Income – T Slips Required

Provide all income slips issued during the tax year:

- T4 – Employment Income
- T4A – Other Income (commissions, scholarships, pension, etc.)
- T4E – Employment Insurance (EI) Benefits

- T4PS – Deferred Profit Sharing Plan

## C. Investment & Other Income

Report all additional income sources:

- T3 – Trust Income
- T5 – Interest and Dividend Income
- T5008 – Securities and Investment Transactions
- Capital Gains Summary
- Rental Income Summary (if applicable)
- Foreign Income Details (including foreign tax paid)

## D. Tax Deductions

Provide receipts and documentation for eligible deductions:

- RRSP Contribution Receipts
- FHSA Contributions
- Union or Professional Dues
- Childcare Expenses
- Moving Expenses (if eligible under CRA rules)
- Support Payments Paid

## E. Tax Credits & Refund Opportunities

Provide documentation for eligible credits:

- Medical Expense Receipts
- Disability Tax Credit Certificate (if applicable)
- Tuition Transfer (from child or spouse)
- Home Buyers' Amount
- Multigenerational Home Renovation Credit

## F. Family & Dependent Information

Provide complete dependent details:

- Names, Dates of Birth, and SIN of Children
- Childcare Receipts

- Shared Custody Details

#### Shared Custody Definition:

Shared custody applies when a child resides with each parent at least 40% of the time during the year. This may affect eligibility for the Canada Child Benefit (CCB) and certain dependent-related tax claims.

## Why This Personal Tax Checklist Is Important

Using a structured personal tax checklist helps:

- Prevent missed income slips
- Reduce risk of CRA reassessments
- Maximize eligible refunds and credits
- Ensure full compliance with Canadian tax rules
- Speed up your tax preparation process

## Recommended For

- Salaried Employees
- Families with Dependents
- Individuals with Investment Income
- Rental Property Owners
- Individuals with Foreign Income

## Ready to File Your Personal Tax Return?

Avoid last-minute errors and missed deductions. Our structured tax review process ensures accuracy, compliance, and maximum refund eligibility.

 Book your appointment online:

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