

Personal Tax Information Checklist

Personal Income

- ☐ T4 – Employment Income
- ☐ T4A – Self-Employed, Pension, Other Income
- ☐ T4E – EI Benefits
- ☐ T4A(P) – CPP Benefits
- ☐ T4A(OAS) – Old Age Security
- ☐ T4RIF – RRIF Income
- ☐ T4RSP – RRSP Income
- ☐ T5007 – Social Assistance Payments
- ☐ T5018 – Contract Payments
- ☐ RC62 - Universal Child Care Benefits
- ☐ Scholarship / Bursaries received
- ☐ Alimony and/or maintenance received

Investment Income

- ☐ T3 – Trust Income
- ☐ T5 – Interest and Dividends
- ☐ T5008 - Statement of Securities Transactions
- ☐ T5013 – Partnership Income
- ☐ Rental Income
- ☐ Capital Gains/Losses from sale of properties

Other Income

- ☐ Business Income (complete T2125)

Other Documentations

- ☐ Notice of Assessment from last year
- ☐ Sale of Principal Residence
- ☐ Automobile logbook

Deductions

- ☐ RRSP Contribution
- ☐ Union or Professional dues
- ☐ Childcare expenses
- ☐ Employment Expenses (T2200)
- ☐ Tuition (T2202) for self and dependents
- ☐ Charitable Donations
- ☐ Political Contributions
- ☐ Medical Expenses
- ☐ Interest Paid on Student Loans
- ☐ Family Caregiver
- ☐ Alimony Paid
- ☐ Moving Expenses
- ☐ Deductible Legal Fees
- ☐ Disability Deductions
- ☐ Losses Carry Forward
- ☐ First Time Home Buyer
- ☐ Home Renovations (seniors and disabled)
- ☐ Adoption Expenses
- ☐ Volunteer Firefighters
- ☐ Search and Rescue Volunteers
- ☐ Carrying charges on investments
- ☐ Digital News Subscriptions
- ☐ Canada Training Credit