

Tax Checklist for Personal and Self-Employed Returns in Canada

General Information

- ☐ Provide SIN, DOB, and current address.
- ☐ Ensure spouse/partner details are available (SIN, income, DOB).
- ☐ Provide dependents' details (names, DOB, SIN, childcare info).
- ☐ Include your most recent Notice of Assessment and any reassessments.

Income Slips

- ☐ Gather T4 slips for employment income.
- ☐ Collect T4A for pensions, annuities, or commissions.
- ☐ Include T5/T3 for investment income.
- ☐ Provide T4E for EI benefits or RC62 for UCCB.
- ☐ Ensure T4RSP/T4RIF for RRSP or RRIF withdrawals are included.
- ☐ Include T4OAS for Old Age Security benefits.
- ☐ Provide T4A(P) for Canada Pension Plan benefits.
- ☐ Include T5007 for workers' compensation or social assistance.
- ☐ Include other income slips such as foreign income, rental income, etc.

Deductions and Credits

- ☐ Compile RRSP contribution receipts.
- ☐ Obtain childcare expense receipts with SIN/business number.
- ☐ Collect medical expense receipts (prescriptions, travel, etc.).
- ☐ Gather T2202 or equivalent tuition certificates for education credits.
- ☐ Provide approved Form T2201 for Disability Tax Credit.
- ☐ Include moving expense receipts if eligible (distance rules apply).

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- ☐ Ensure receipts for tools purchased by tradespersons are included.

Special Tax Credits

- ☐ Verify eligibility for Canada Workers Benefit (CWB).
- ☐ Include renovation receipts for home accessibility expenses.
- ☐ Provide receipts for digital news subscriptions.

Self-Employed Checklist

- ☐ Prepare detailed records of business income (sales, invoices).
- ☐ Compile receipts for home office expenses (utilities, rent, etc.).
- ☐ Provide vehicle expense records with mileage log and receipts.
- ☐ Include receipts for tools and business-related equipment.
- ☐ Ensure records for GST/HST collected and paid are ready.
- ☐ Document capital cost allowance (depreciation on assets).

Filing Process

- ☐ Decide on filing method: NETFILE or paper submission.
- ☐ Ensure all documents are ready for April 30 (personal) or June 15 (self-employed).