

Personal Tax Checklist

Don't forget to report all income.

Forgetting to include income can be a costly mistake.

Here is a sample of income items you should be sure to include.

Income

- T4 slips (employment income)
- Self-employment income and expenses
- Farm or fishing income and expenses
- Rental income and expenses
- T3 slips (investment income)
- T5 slips (investment income)
- T5008 (statement of securities transactions/investment gain or loss)
- Non-registered investment gains and/or losses
- T4A (other pensions, scholarships and annuities)
- T4AOAS (statement of old age security income)
- T4AP (statement of Canada Pension plan income)
- T4E (employment insurance income)
- T4RSP (RRSP income)
- T4RIF (RIF income)
- T5013 (partnership income)
- T5007 (social assistance payments, worksafe compensation)
- Other income not reported on a slip (tips)
- Spousal support payments received
- Home buyers amount and repayment amount
- Information on primary residence sold
- Information on other property disposed, including rental property
- Prior year tax return and notice of assessment (new clients only)

Other items, including deductions and credits

Deductions and credits help reduce your taxes owing.

Here is a sample of some items that can help you save money.

Receipts and other information

- RRSP contribution slips
- T2200 (eligible employment expenses - signed by employer)
- T2202A (tuition slips)
- Teacher school supplies
- Moving expenses (for employment or schooling)
- Medical receipts (including annual premiums paid)
- Charitable donation receipts
- Political donation receipts
- Child care expenses
- Adoption expenses
- Spousal support payments (child support is not deductible)
- Office in home expenses (applicable for self employed)
- Tool expenses (for tradesperson)
- Professional or union dues
- Investment council fees
- Interest paid on investment borrowing
- Digital news subscription expenses
- Home accessibility expenses
- Volunteer firefighter certification
- Auto/travel logbook and expenses
- TL2 form for transport drivers - signed by employer
- Tax installments paid
- Void cheque if you are changing your banking information