



Personal Tax Checklist

INCOME

INCOME SLIPS

- T4 slips- Employment
- T4A- Pension
- T4OAS- Old Age Security
- T4AP- CPP
- T4RSP- RRSP
- T4RIF- RRIF
- T4E- EI
- T5007 (WCB/ Social assistance)
- T5013 (Partnership income/loss)

OTHER INCOME

- Foreign Income
- Self-Employment Income
- Rental Income
- Tips
- Other: _____
- Other: _____

OTHER SLIPS

- T2202A (Tuition slip)
- Red seal training program
- T2200 (Employment expenses slip)

INVESTMENT SLIPS

- T5 (Interest or taxable dividends)
- T3 (Trust)
- T5008 (Securities transactions/ capital gain, capital loss)
- Other: _____

IMPORTANT DOCUMENTATION

- Direct deposit- void cheque
- Prior years' Notice of Assessment
- Home Buyer's Plan or Life Long Learning
- Plan Installments payments
- Principal residence sale
- Sale of rental property

DEDUCTIONS

RECEIPTS

- | | |
|--|--|
| <input type="checkbox"/> RRSP contributions | <input type="checkbox"/> Student loan interest |
| <input type="checkbox"/> Charitable/ Political donations | <input type="checkbox"/> Business expenses (If applicable) |
| <input type="checkbox"/> Medical receipts | <input type="checkbox"/> Investment/Management fees |
| <input type="checkbox"/> Extended health and dental, and/or travel insurance | <input type="checkbox"/> Professional or union dues |
| <input type="checkbox"/> Child care expenses | <input type="checkbox"/> Moving expenses |
| <input type="checkbox"/> Employment expenses (T2200 required) | <input type="checkbox"/> Child support |
| <input type="checkbox"/> Disability tax credit certificate (Must be approved by CRA) | <input type="checkbox"/> Spousal support |
| <input type="checkbox"/> First-time home buyers Information | <input type="checkbox"/> Other: _____ |