



## Personal Tax Checklist

### INCOME

#### Personal

- T4, T4A – Salaries and Employment Income
- Other Employment Benefits
- T4A (P) – Canada Pension Plan Benefits
- T4A (OAS) – Old Age Security Benefits
- T4A – Other Pensions or Superannuation
- T4RSP – RRSP Income
- T4RIF – RRIF Income
- T4E – Employment Insurance Benefits
- T5007 – WCB Benefits / Social Services Benefits
- T1137 – Home Buyers Plan
- T4RCA – Retirement Income

#### Other

- Alimony Received
- Taxable Child Support Received
- Scholarships / Bursaries
- Other – Specify

#### Investment

- T3, T5, T4PS – Interest and Dividends
- T5008 – Statement of Security Transactions
- Interest on Tax Refunds(s)
- T600 – Canada Savings Bonds
- T3 – Mutual Fund Income
- Foreign Income
- Annuities
- Rental Income ( Full Details Required)
- Summary of Investment Contract Holdings
- T5013 – Limited Partnership Income (Loss)
- Capital Gains / Losses (Full Details Required)

#### Business

- Self –Employment Earnings Information
- Farming / Fishing Earnings Information
- Professional Earnings Information
- Self – Employed Commission Earnings Information

### DEDUCTIONS & CREDITS

#### Non – Refundable Credits

- Married Amount – Spouses Net Income \$ \_\_\_\_\_
- Equivalent to Married Amount (Full Details Required)
- Disability Deductions
- T2202 - Tuition Fees / Education Credit for Dependand  
Dependants Net Income \$ \_\_\_\_\_
- Medical Receipts
- Charitable Donations
- Attendant Care Expenses
- Limited Partnership Losses of Other Years
- Volunteer Firefighter Amount
- Monthly Transit Passes
- Child Fitness Receipts and/or Arts Receipts

#### Other Items

- Political Contribution Receipts
- Capital Losses Carry Forward
- Allowable Business Investment Loss
- Employment Insurance Benefit Repayments
- Dependand Data (GST Credit and Child Tax Benefit)
- T2200 – Declaration of Conditions of Employment
- Loss Carry Forward Information

#### Other Deductions

- RRSP Deductions
- Union / Professional Dues
- Alimony Paid
- Deductible Child Support Paid
- Safety Deposit Box Charges
- Interest Paid on Student Loans
- Interest and Carrying Charges on Investments
- Investment Counsel & Accounting Fees
- Employment Expenses (Full Details Required)
- Deductible Legal Fees
- Child Care Expenses (Receipts Required)
- Moving Expenses (Full Details Required)
- TL2 – Claim for Board and Lodging

#### Expenses

- Restricted Farming Losses Carry Forward
- Prior year Notice of Assessment
- Instalment Payments for current year
- Details on Foreign Property held (CND \$ 100,000.00)
- Capital and Non-Capital losses carry forward

#### IMPORTANT QUESTIONS FOR ELIGIBILITY OF TAX CREDITS:

1.
  - a. How many individuals live in your home, what are their ages and relationship to you?
  - b. Has there been any changes to the number or status of any members in your household?
2.
  - a. Whom to you support financially? Do you make support payments?
  - b. Did you pay for an attendant, childcare provider or any retirement or nursing home costs?
3. Does anyone living with you have a mental or physical infirmity or disability?
4. Did your marital status change during the years?
5. Did anyone in your family arrive in or leave Canada?
6. Did anyone in your family pay for medical expenses this year, other than MSP?
7. Did anyone in your family attend a post secondary institution, part time or full time?
8. Did anyone in your family pay **private** extended health or dental premiums?
9. Did anyone in your family make donations or gifts to charities?