

## Personal Tax Information Checklist

This checklist has been provided to assist you in gathering the information necessary to complete your personal tax return. You do not need to complete the checklist if you are already familiar with all of the information required, nor do you need to return this checklist to our office. This checklist includes all the various items of information that may be necessary. Many items may not be applicable to your situation. Please feel free to contact our office if you have any questions while reviewing this checklist and/or gathering the information for your personal tax return.

### INCOME

- ☐ T4 - Employment Income
- ☐ T4A - Other income
- ☐ T4A(OAS) - Old Age Security
- ☐ T4A(P) - CPP benefits
- ☐ T4A - Pension income
- ☐ T4A - Co-op equity payment
- ☐ T4E - Employment Insurance benefits
- ☐ T4PS - Employee profit-sharing plan allocation
- ☐ T5007 - WCB/Social Assistance payments
- ☐ T5008 - Statement of securities transactions
- ☐ T5013 - Partnership income - details
- ☐ T3 - Trust and mutual fund income
- ☐ T5 - Interest and dividends
- ☐ T4RSP - RRSP withdrawals
- ☐ T4RIF- RRIF income
- ☐ Spousal support received
- ☐ Taxable child support received
- ☐ Business income and expenses
- ☐ Professional income and expenses
- ☐ Farming/Fishing income and expenses
- ☐ Rental income and expenses
- ☐ Commission income
- ☐ Capital gains/losses
- ☐ Scholarships/Bursaries
- ☐ Foreign income
- ☐ Other - specify

### OTHER

- ☐ Installments
- ☐ if you sold your principal residence during the year, provide the year of purchase and sale price
- ☐ Disability credit (if new, T2201 need to be filled out by your physician)
- ☐ Do you have any assets or income from foreign countries? – T1135
- ☐ If you would like us to contact your invest broker, please provide their contact information.

### DEDUCTIONS AND CREDITS

- ☐ AGR-1 - Farm Support payments
- ☐ T101 - Flow-through shares
- ☐ T2202/TL11 - Tuition receipts
- ☐ RRSP receipts - RRSP contributions
- ☐ FHSA receipts - First Time Home Savings Plan
- ☐ T2200 - Declaration of Conditions of Employment
- ☐ Adoption expenses
- ☐ Allowable business investment loss
- ☐ Attendant care expenses
- ☐ Caregiver amount
- ☐ Charitable donation receipts
- ☐ Childcare expense/overnight camp expense
- ☐ Employment related expenses (summary)
- ☐ Eligible teaching supplies purchased
- ☐ Gain/loss summaries for sales of stocks, bonds or real estate
- ☐ Carrying charges and interest expenses
- ☐ Purchase of new home (details, if any)
- ☐ Interest paid on student loans
- ☐ Medical expense receipts (or summary)
- ☐ Premiums paid to private medical insurance plans
- ☐ Moving expense receipts (or summary)
- ☐ Office-in-home expenses (summary)
- ☐ Political contribution receipts
- ☐ Tradespersons tools expenses
- ☐ Union and professional dues
- ☐ Multigenerational Home Renovation Tax Credit
- ☐ Active families benefit activities' amounts – SK  
(Families must have combined income of \$60,000 gross or less to claim benefit)

