

Personal Tax Return Checklist

Task	Response	Notes
First and Last Name		
Phone		
Email		
SIN		
Date of Birth		
Citizenship		
Marital Status		
INCOME		
Employment – T4		
Old Age Security – T4A (OAS)		
Canada Pension Plan benefits – T4A (P)		
Retirement Income – T4A for pensions, T4RSP, T4RIF		
Employment Insurance – T4E		
Self-employment income (please attach details of income, expenses and capital purchases)		
Interest, Dividends and other Investment Income – T5/T600		
Mutual Funds and other Trust Income – T3		
Partnership or joint venture income		
Business or Professional – Financial Statements or T5013		
Income from a profit-sharing plan		
Income from Social Assistance		
Rental Property (attach details of income, expenses, purchases and sales)		
If assets have been purchased for use in the business, or loans incurred for business purposes, provide appropriate documents		
Capital Gains/Losses – please provide brokers' annual summary		
Did you dispose of any capital properties this year? (attach copies of sales detail and purchase documentation).		
Separation allowances or child maintenance (amounts received and updated agreement, if applicable)		
Pension income from foreign sources		
Other income (e.g. stock options, annuities, scholarships, bursaries, research grants, RRSPs/ RIFs – attach T4RSP, Workers' Compensation benefits)		
DEDUCTIONS		
Registered Retirement Savings Plan contributions (attach receipts) (attach T10 – Personal Adjustment Reversal, if received)		
Annual union, professional dues (attach receipts)d Choice		
Child care expenses (attach receipts)		
For individual child care providers, please have it split by child, include S.I.N. and address of care centre		
For summer camps, indicate number of weeks in residence, please have it split by child		
Attendant care expenses (attach receipts)		
Allowable business investment losses (refer to Capital Gains/Losses above)		
Moving expenses (attach receipts). Indicate distance moved to new employment		
First time home buyer If so, date of purchase		
Alimony or separation allowances paid (include name(s) and address(es) of recipients; attach copy of agreement or court order if changed or not previously provided)		
Commission and employment expenses (include details and T2200 or TL2)		
Carrying charges (interest on money borrowed to earn investment income, investment counsel fees, interest for limited partnerships)		
Federal and provincial political contributions (attach receipts)		
Medical/Dental/Vision/Physio/RMT/Chiro expenses (attach receipts) and details of private health insurance premiums including amounts paid while travelling		
Disability deduction for you or dependant (if first-time claim, attach T2201 signed by physician)		
Adoption expenses		
Tuition fees (attach signed T2202/T2202A including amounts that can be transferred from dependants)		
Interest paid on student loans (attach reporting slip)		
If you are a teacher or early childhood educator; provide a summary of eligible supplies to a maximum of \$1,000 in the calendar year		
Other deductions and expenses (attach receipts)		
DEPENDENTS (repeat for all dependents)		
Name of Dependent		
Birth Date of Dependent		
Relationship		
Income (please provide T4 or other income information)		
Deductions (please provide receipts)		
FOREIGN PROPERTY		
Own foreign property at any time during the year in excess of \$100,000, as well as any investment in "foreign affiliates"?		
*Please provide information if answer is Yes.		
PRINCIPAL RESIDENCE		
If sold during the current year, provide copies of all documents concerning the sale. In addition, please summarize the following:		
Year of Acquisition		
Proceeds of Disposition		
CRA ACCESS		
Please provide me with CRA Access to all of your personal account with CRA.		
This can be done through your My CRA Individuals account. On the right hand side click on "Authorize Representative"		