



Personal Income Tax Checklist

GENERAL ITEMS	DEDUCTIONS – GENERAL	
<ol style="list-style-type: none"> 1. A copy of last year's return, including spouse's return if not being processed together 2. Contact details if changed 3. Last year Notice of Assessment 4. Other years' reassessments 5. Details of changes to your personal status such as dates of marriage, separation, divorce or widowed, births and deaths 6. Separation agreement (if it is the first year) 7. Names of spouse & dependents 8. Note consenting to provide your income tax information to Elections Canada 9. Instalment payments 10. Details of foreign property holdings including those in Canadian Investment account, cost of property held (T1135) 11. Details of lawsuits settled in current year 12. TFSA statements 	<ol style="list-style-type: none"> 1. RRSP contributions 2. Medical, dental, prescription drugs, nursing home expenses 3. Payments to a private health insurance plan 4. Charitable donations 5. Tuition fees/education amount (T2202A) for yourself or transferred from a dependent such as a child or grandchild 6. Interest paid on student loans 7. Professional dues, union dues 8. Public transit passes 9. Children's sports and/or arts credits 10. Interest on loans assumed to purchase investments 11. Professional consultant fees 12. Legal fees paid to establish child or spousal support or to enforce a pre-existing agreement 13. Legal fees paid to recover wages from your employer 14. Details of people you support and their medical status 15. Attendant care expenses 16. Child care receipts 17. Moving expenses if you moved 40km or closer to work or school 18. Property taxes or residential rent paid and to whom 19. First time home buyer 20. Political contributions receipts 21. Disability tax credit claim (T2201) 22. Spousal support payments paid 23. Adoption expenses 24. Ontario health home renovation costs incurred by those 65 & older 	<ol style="list-style-type: none"> 3. Office rent if required as a condition of employment 4. If you are a commissioned salesperson, home office expenses, details supporting advertising expenses, promotion, meals and entertainment 5. Motor vehicle expenses 6. Trades people & apprentice tool purchases, if eligible 7. TL2 meals & lodging for transportation employees
<p>INCOME</p> <ol style="list-style-type: none"> 1. Universal child care benefit (RC62) 2. Employment income (T4) 3. Pension income (T4A, T4A(P), T4RIF, T4RSP) 4. US social security 5. Old age security (T4OAS) 6. Investment income (T5) 7. Income from trusts such as mutual fund investments (T3) 8. Income from employment insurance (T4E) 9. Income from partnerships (T5013) 10. Workers compensation/social assistance payments (T5007) 11. Details of the sale of securities such as stocks and bonds (eg. trading summary from your broker) 12. Details of real estate sales, lawyer statement of adjustments 13. Foreign income and taxes paid 14. Spousal support payments received 	<p>DEDUCTIONS – EMPLOYEES</p> <ol style="list-style-type: none"> 1. Declaration of conditions of employment form (T2200) 2. Expenses not reimbursed by your employer including travel expenses (eg. parking, taxis, bus fare), supplies and salaries of assistants 	<p>UNINCORPORATED BUSINESSES</p> <ol style="list-style-type: none"> 1. Bookkeeping records 2. Total sales revenue for the year 3. Total expenses listed by category for the year 4. HST collected and paid 5. Capital assets acquired (eg., computers and peripherals, furniture and equipment) 6. Home office expenses 7. Motor vehicle expenses 8. Partner's information
		<p>DEDUCTIONS – MOTOR VEHICLES (if eligible)</p> <ol style="list-style-type: none"> 1. Total kilometers driven and kilometers driven just for business 2. Details of total expenses incurred for gas, maintenance and repairs, insurance, license and registration, loan interest and lease payments 3. New vehicle, purchase / lease agreement
		<p>RENTAL PROPERTIES</p> <ol style="list-style-type: none"> 1. Address and number of units 2. Rental income by unit 3. Rental expenses by unit and by category of expense 4. Motor vehicle expenses † 5. Partners 'names, addresses and SINS 6. Legal fees