

Personal Income Tax Return Checklist

Name: _____ Date of Birth: _____

Address: _____ SIN: _____

Phone #: _____ Email: _____

Marital Status: _____ Spouse / Common-law (if applicable): _____

Children: If yes, Names and Date of Birth: _____

The following is a sample of common income and deductions for individuals. **This is not a complete list.**

- Copy of prior year personal tax return / Notice of Assessment / any correspondence from CRA

INCOME SOURCES:

- T4 - Employment income
- T3 or T5 - Investment income
- T4A, T4A (OAS), T4A(P) – Pension income sources
- T4RIF or T4RSP – Retirement income
- Other Income
 - Business income/ Rental income
 - Sale of investments resulting in capital gains or losses

DEDUCTIONS

- RRSP (RRSP – Home Buyers' Plan / RRSP – Lifelong Learning Plan)
- Professional or union dues
- Pension split options
- Child care expenses
- Accounting fees or Investment counsel fees
- Interest on money borrowed to purchase investments

NON REFUNDABLE TAX CREDITS:

- Medical expenses / disability tax credit / caregiver credit
- Charitable and political donations
- Children's Fitness and Arts expenses (\$500 max in BC but eliminated with federal gov't in 2017)
- Public transit credit (If used from Jan 1 to June 30, 2017)
- Tuition fees (T2202) / Interest on student loans
- First-time home buyers - Acquired after January 27, 2009

OTHER ITEMS

- Personal income tax instalments
- Sale of Principal Residence disclosure requirements
- Home Renovation Tax Credit for Seniors and Persons with Disabilities
- Any foreign property over \$100,000 held outside of Canada. This includes stocks and real estate.