

## 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 / Online sales
  - 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
- Support payments
- Accounting fees or Investment counsel fees
- Interest on money borrowed to purchase investments or student loans

### NON REFUNDABLE TAX CREDITS:

- Medical expenses / disability tax credit / caregiver credit
- Charitable and political donations
- Tuition fees (T2202) / Interest on student loans
- Home Accessibility Expenses for Seniors or Persons with Disabilities
- First-time home buyers - Acquired after January 27, 2009

### OTHER ITEMS

- Tax instalments
- Sale of Principal Residence disclosure requirements
- Any foreign property over \$100,000 held outside of Canada. This includes stocks and real estate.