

Personal Income Tax Checklist

1. All applicable income tax slips:

- T3
- T4
- T4A
- T4A(OAS)
- T4A(P)
- T4E
- T4PST4RIF
- T4RSP
- T5
- T10
- T2200
- T2202
- T101
- T1163
- T1164
- TL11A, B, C and D
- T5003
- T5007
- T5008
- T5013
- T5018 (Subcontractors)
- RC62 and corresponding provincial slips

2. Other sources of income with no income tax slips:

- other employment income (including stock option plans and Election Form T1212)
- business income (farming and fishing businesses have special rules)
- partnership income
- rental income
- alimony

- separation allowances
- child maintenance (including divorce agreement)
- pensions (certain pension income may now be split between spouses) Foreign pension income has special rules
- interest income earned but not yet received - example Canada Savings Bonds, Deferred Annuities, Term Deposits, Treasury Bills, Mutual Funds, Strip Bonds, Compound Interest Bonds
- professional fees
- director fees
- scholarships, fellowships, bursaries

3. Expenses:

- employment related expenses - Provide Form T2200 - Declaration of Conditions of Employment (signed by employer)
- tools acquired by apprentice vehicle mechanics, Page 2 of 5
- business and employment purchases like vehicles, supplies, etc.,
- interest on money borrowed to purchase investments
- investment counsel fees
- moving expenses - including costs of maintaining a vacant former residence
- child care expenses
- alimony, separation allowances, child maintenance (including divorce agreement, support amount was paid)
- accounting, legal and other professional fees
- pension plan contributions
- film and video production eligible for tax credit
- mining tax credit expenses
- scientific research and development expenses
- adoption related expenses
- clergy residence deduction information, including Form T1223
- disability supports expenses (speech, sight, hearing, learning aids for impaired individuals and attendant care expenses)
- tradesperson's tools acquired by an employee

- public transit passes acquired
- amounts paid for programs of physical activity or arts for children under age 16 at any time during the year (under 18 for children with disabilities)

4. Details of investments:

- real estate or oil and gas investments - including financial statements
- labour-sponsored funds

5. Other applicable documents and/or receipts:

- Registered Retirement Savings Plan (RRSP) contributions
- professional dues
- tuition fees for both full-time and part-time courses for you or a dependant - including mandatory ancillary fees, and Forms T2202, TL11A, B, C and D where applicable
- charitable donations
- medical expenses for you or a dependent person (including certain medical related modifications to new or existing home and travel expenses). Note that purely cosmetic procedures do not qualify after March 4, 2010
- political contributions.

6. Details of capital gains and losses realized in previous year. This may be obtained in some circumstance by contacting your investment advisor.

7. Name, address, date of birth, S.I.N., and province of residence on the last day of the previous year.

8. Personal status – single, married, common-law, separated, divorced, widowed, if changed in current year. If married or common-law – spouse/partner’s income, S.I.N. and birth date.

9. List of dependants/children - including their incomes and birth dates.

10. Details regarding residence in prescribed area which qualifies for the Northern Residents Deduction.

11. Details regarding contributions and withdrawals from Registered Education Savings Plans.
12. Details regarding RRSP - Home Buyers' Plan withdrawals and repayments; RRSP - Lifelong Learning Plan repayment.
13. Details on prior income tax installments or, payments of tax, if we do not have access to your tax account on CRA's Represent a Client
14. Assessment Notices and any correspondence from Canada Revenue Agency (CRA).
15. Details of foreign property owned at any time in the previous year including cash, stocks, trusts, partnerships, real estate, tangible and intangible property, contingent interests, convertible property, etc. Required details include: description of property, related country, maximum cost in the year, cost at year-end, income and capital gain/loss for each particular property.
16. Details of income from, or distributions to, foreign entities such as foreign affiliates and trusts.
17. Details of your Pension Adjustment Reversal if you ceased employment and were in a Registered Pension Plan or a Deferred Profit Sharing Plan. (T10 Slip)