

Personal Taxes Checklist

Personal Information

- Change in Address
- Update Dependent Information
- Change in Martial Status
- Property owned outside Canada >\$100K
- Sale of Property (Personal or Investment)

Employment Income

- T4 – Employment Income
- T4PS – Profit Sharing
- T2202 – Employment Expenses Statement
- Employment expenses
- Apprentice? – Tool/Supplies bills
- Stock Options
- Professional/Union Dues

Investment Income

- T3 – Trust Income
- T5 – Investment Income
- T5008 – Statement of Securities Transactions
- Interest Paid to earn investment income
- Management Fees
- Investment Counseling Fees
- Sale of an Investment Property

Pension Income

- RRSP Contributions Slips
- T4RSP – RRSP Withdrawal
- T4A(OAS) – Old Age Security Income
- T4AP – Canada Pension Plan Income
- T4A – Pension Income
- T4RIF – RIF Withdrawal

Rental Income

- Rental Income and Expenses (See Spreadsheet)
- Details of Capital Purchases

Business

- Business Expense Spreadsheet
- Details of Capital Expenses
- Access Code for HST filing
- Payroll Information

Others

- Donations
- Medical
- Child Care Expenses
- Moving Expenses
- Meals and Lodging Deduction
- Tuition Slips
- Rent/Property Taxes
- Spousal/Child Support Income
- Home Buyers Plan and LLP
- T4E – Unemployment Income
- T2201 – Disability Tax Credit
- Adoption of Child Expenses
- First time Home Buyers Credit
- Student Loans
- Copy of Last year's taxes and Notice of Assessment
- T4A (CERB)
- T4A (CRB)