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## PERSONAL INCOME TAX RETURN CHECKLIST

### Personal Information

Current mailing address:

Phone number:

Email:

Details of any change in marital

### Dependents

Names

Birth date

SIN

Names

Birth date

SIN

**For new client, please bring prior year tax return & assessment and go to  
CRA "MY ACCOUNT"/ UNDER PROFILE >MANAGE REPRESENTATIVES>ADD our BN:810478172**

**Personal income tax installments paid for this year:**

### Foreign Property

Did you own or hold foreign property with an **adjusted cost base** of more than \$100K at any time during i.e. Marketable securities, foreign rental property..

### Principal Residence

Did you change the use of your principal residence? i.e. Move out and rent out your principal residence?  
**Provide the following: Acquisition date; Disposition date; Cost; Sale proceeds; Selling expenses**

### Direct Deposit / CRA On-Line Mail

Are you registered? Please register and/or advise us

If you would like to register to receive correspondence from CRA on-line please let us know

### General income

T4 Employment income

T4E - Employment insurance

T5007 - Workers' Compensation Benefits / Social Assistance payments

T4A - Self-Employed Commissions

### Pension and Other Income

T4A - Pension, retirement, annuity, old age security, or other income

T4AP - Canada Pension Plan benefits

T4OAS - Old Age Security pension

T4RIF - Income from a registered retirement income fund

T4RSP - Income from registered retirement savings plans

Foreign pension income

### Investment Income & Deductions

T3 - Interest, dividends, capital gains, mutual funds

T4PS - Statement of employee profit-sharing plan allocations & payments

T5 - Investment and dividend income  
T5013 - Statement of partnership income  
T5008 - Statement of securities transactions  
Annual trading summary; realized gain / loss on investments summary (usually obtainable from broker)  
Interest paid on loans for investment purposes  
Other carrying charges or investment management fees paid – for **NON-REGISTERED ACCOUNTS ONLY**  
Information on any business investment losses  
Other capital property dispositions – i.e. sale of rental property, etc.

### **Deductions**

RRSP receipts, Any Home Buyers repayment plan  
Union & professional dues receipts  
Child care expenses and/or attendant care expenses  
Spousal alimony support payments received or paid – including spouse's name and SIN  
Employment expenses? Need form T2200 from employer

### **Self-employment / Business / Professional / Rental Income & Deductions**

Details of self-employed income and expenses for the calendar year  
Home office expenses – i.e. square footage usage, utilities, insurance, strata fees, mortgage interest, property taxes & rent, if applicable  
Details of real estate rental income and expenses for the calendar year

### **Other Credits**

Tuition slips (T2202A) and receipts  
Statement of interest paid on student loans  
Medical & dental receipts – including amounts paid to a private health services plan

### **- ONLY NON-REIMBURSED AMOUNTS**

Attendant care or long-term care facility costs – may be claimed as medical expenses in certain situations  
Charitable and political donations receipts  
Home renovation expenses (up to \$10,000) that improve accessibility for qualifying individuals;  
A qualifying individual is: - an individual who is 65 years or older or, an individual who is eligible for the disability tax credit.

Home buyers' amount – Can claim \$5,000 for the purchase of a qualifying home (must meet certain conditions);

Eligible Educator School Supply Tax Credit – Can claim up to \$1,000 as an eligible supplies expense. Must meet certain conditions:  
Eligible educator includes a teacher (elementary or secondary school) or, an early childhood educator at a regulated child care facility AND, Must meet the “eligible teaching supplies” conditions as set out in the CRA guide.