



Personal Income Tax Checklist

Income Items

- Previous year's tax return
- Previous year's Notice of Assessment and Mailing Label
- All information slips (e.g. T4, T4A, T4A(P), T4A(OAS), T5, T3, T5007)
- Investment income not on slips (Interest, Dividends, Capital Gains)
- Partnership statements
- Rental property income and expenses
- Business or professional income and expenses
- Sale of property including books, bonds, and real estate - provide details
- Other income (e.g. RRSP withdrawal, foreign pension income)

Deductions

- RRSP contributions
- Union or Professional Dues
- Childcare expenses - Form T778
- Interest expenses related to business or investments
- Safety Deposit Box
- Alimony or Child Support
- Moving expenses
- Employment expenses (Automobile or Home Office) - You require a signed [T2200 Form*](#)
- Prior Year Losses

Tax Credits

- Medical Expenses
- Disability
- Tuition fees - Form T2202A signed by student
- Charitable donations
- Political donations
- Tax installments - slips or details
- Property taxes or rent paid - provide details

Personal

- Spouse - provide social insurance number, date of birth, income and deductions **
- Dependents - provide social insurance number, date of birth and net income **

This is not intended as a complete checklist but we hope it helps.

Please call if you need additional help, or require explanations concerning this information.

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