

# Personal Tax CHECKLIST

## INCOME

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- T3 Investment Income
- T4/T4A -Employment Income or Commission Income
- T4A-P/T4A-OAS Canada Pension/Old Age Security Pension
- T4A-CERB/T4A-CRB Canada Emergency Response/ Canada Response Benefit
- T4E Employment Insurance Income
- T4RIF Registered Income Fund Withdrawals
- T4RSP RRSP Withdrawals
- T5 Dividend and Interest Income
- T5007 Workers' Compensation Benefits
- T5008 Statement of Securities Transactions including gain/loss summary report from your financial institution
- T5013 Limited Partnership Income
- Rental Income/Expenses (form T776 on [ctt-cpa.ca](http://ctt-cpa.ca))
- Self-employed (small business) income (worksheet on [ctt-cpa.ca](http://ctt-cpa.ca))
- Foreign Income including pension income from other countries

## IDENTIFICATION

### PLEASE CHECK IF:

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- 1 You are **NOT** a Canadian Citizen
- You are a U.S. Citizen
- You owned foreign property of more than \$100,000
- You do **NOT** want to be identified to Elections Canada for its records

## CREDITS AND DEDUCTIONS

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- Charitable donations and political contributions
- RRSP Contributions made up to March 1st
- Child care expenses
- Union or professional dues
- T2200 & employee expenses (form T777 on [ctt-cpa.ca](http://ctt-cpa.ca))
- Medical expenses for all family members
- Interest paid on loans for investment purposes
- Moving expenses incurred as a result of a change in job/school
- Home Buyers Plan withdrawals and repayments
- T2202A Tuition fees paid
- Spouse and dependents' income and expenses
- Adoption or fertility treatment costs
- First time homebuyers tax credit
- Renovate a dwelling for accessibility purposes for a senior or person who is disabled

## MISCELLANEOUS ITEMS

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- Spousal/child support paid/received in tax year
- Employee stock option information
- Tax instalments paid towards income tax
- Property tax or rent paid in tax year
- Tradesperson's tools and expenses
- Are you on title of a property that you do not live in?
- Change of marital status (please provide date)
- Eligibility for the Disability Tax Credit
- Sale of Principal Residence (form on [ctt-cpa.ca](http://ctt-cpa.ca))
- Sale of stocks/bonds/mutual funds/real estate
- Teacher/ECE educator school supply expenses
- Are you joint owner of an investment with a parent/ sibling/child?