

Personal Tax Checklist

Please submit documents for any item that you check off below.

INCOME

- ☐ 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—see form T776 on our website
- ☐ Self-employed (small business) income—see worksheet on our website
- ☐ Foreign Income including pension income from other countries

CREDITS AND DEDUCTIONS

- ☐ 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 our website)
- ☐ 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

IDENTIFICATION—Please check if:

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

MISCELLANEOUS ITEMS

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

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