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PERSONAL TAX RETURN CHECKLIST

General

- Changes to personal or family status including marriage, separation, births and deaths
- Contact details if changed from last year

Slips

- All T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5)
- Tuition / education receipts (T2202A)
- Universal Child Care Benefit (RC62)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- All other information slips

Receipts

- RRSP contribution slip
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons)
- Medical expenses
- Transit pass receipts
- Charitable donations
- Political contributions
- Child care expenses
- Adoption expenses

- Children's arts and sports programs
- Moving expenses
- Interest paid on student loans
- Carrying charges and interest expenses
- Office - in-home expenses
- Exams for professional certification

Other documentation

- Notice of Assessment/Reassessment
- Canada Revenue Agency correspondence
- Sale or deemed sale of stocks, bonds or real estate
- Rental income and expense records
- Business, farm or fishing income/expenses
- Automobile / Travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification
- Details of Foreign Income and/or Foreign Property*

* Foreign property – If you owned foreign property with cumulative cost of more than C\$100,000 at any time in the year, details of the holdings and related income must be disclosed to CRA. This includes foreign investments held by a Canadian broker, foreign bank accounts, real estate and other investments. CRA has put in place significant penalties for non compliance. Please contact us immediately if this applies as additional information will be required