

## Personal Income Tax Return Check List

- Prior year's tax return
- Prior year's notice of assessment
- Personal information (SIN's, address, date of birth, marital status, dependents)

### Slips:

- Employment Income (**T4**)
- Employment Insurance Benefit (**T4E**)
- Social Assistance, ODSP or WSIB Income (**T5007**)
- Old Age Security Pension (**T4OAS**)
- Canada Pension Plan Benefits (**T4AP**)
- Universal Child Care Benefits (**RC62**)
- Registered Income Fund Pension Income (**T4RIF**)
- Registered Savings Plan Income (**T4RSP**)
- Other Pensions and Annuities, Retiring Allowances (**T4AP**)
- Apprenticeship Grants, Scholarships, Bursaries, Fellowship Income (**T4A**)
- Registered Education Savings Plan income-RESP (**T4A**)
- Tuition, Education, Textbook Amounts (**T2202A**)
- Investment Income-Interest (**T5**)
- Foreign Pensions and Investment Income
- Statement of Contract Payments-Construction Industry (**T5018**)
- RRSP paid during the year up to the end of February of the following year

### Receipts:

- Rent or Property Taxes Paid
- Senior Home Owners Property Tax Grant Notice
- Medical Expenses including Dental, Prescriptions, Eyewear, Doctors Fees, Medical Insurance Premiums, Mileage/Dates for out-of-town Appointments. (you can get a Patient Tax Receipt Report from your pharmacy or dental office)
- Charitable Donations
- Political Contributions (Federal & Provincial)
- Child Care Expenses
- Child or Spousal Support
- Children's Fitness/Activity/Arts Receipts
- Healthy Homes Renovation Tax Credit Receipts (Seniors)
- Union Dues or Professional Fees
- Interest Paid on Student Loans
- Interest on loans paid to earn investment income
- Public transit passes
- Moving expenses for which you were not reimbursed (40km+ move for new employment or post-secondary education)
- Travel Expenses (**only** for qualified employees (T2200) or self-employed)
- Adoption Expenses

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### Sole proprietorship

- Total sales or revenues for the year
- Total expenses
- Home office expenses:
  - The percentage of utilities,
  - Automobile/Travel Logbooks
  - property taxes related to your small business

### Rental properties

- Rental Property Income and Expenses-*summarized*
  - Rent received for the year (for each unit rented)
  - Maintenance costs
  - Repair costs,
  - Interest payments,
  - Property taxes
  - Insurance

### Additional Documentation that may be required

- Canada Revenue Agency (CRA) Notices of (Re)Assessment, Letters, Correspondence
- Court Order or Separation Agreement
- Declaration of Conditions of Employment (T2200)
- Disability Tax Credit Certificate (T2201)
- Capital gains/losses records
- Court Order or Separation Agreement
- Details of any Income Producing Property Purchases or Sales in the Year
- Details of Purchases and Sale of Investments (**if Sold**)-Stocks, Bonds
- Deed for House for First Time Homebuyers
- Statement of Adjustments for Prepaid Property Taxes on Home Purchased or Sold in the Year
- Northern Residence Deduction Particulars
- **T2200** Declaration of Conditions of Employment (**signed by employer**)
- **T2201** Disability Tax Credit Certificate (**filled out by Physician**)-*Letter if approved by CRA*
- **TL2** Claim for Meals and Lodging (**signed by employer**)

Note: You will receive all tax slips by the end of February of the following year, please note that you are responsible to provide all relevant information to CRA when you file your income tax return.

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