

Personal Check List

1. Here is the list of items required to file your Personal Tax return:

Taxpayer Information

- Name
- SIN Number
- Mailing Address
- Date of Birth
- Telephone Numbers & Email

Spouse and Dependents Details

- Name
- Date of Birth
- SIN Number

2. Encircle the appropriate box and attached the relevant slip/receipt

Slips and Statements

- Employment income-T4
- Pension, Retirement, Annuity, and other income (Scholarships, Bursaries)-T4A
- Employment insurance benefits-T4E
- Pension Plan benefit-T4A(P)
- Old Age Security -T4A-(OAS)
- RRSP Withdrawal -T4RSP
- Interest and Dividend Income-T5
- Declaration of Conditions of Employment (T2200)
- Disability Certificate-T2201
- Tuition / education receipts -T2202A
- WITB Advance payment-RC210
- Universal Child Care Benefit -RC62
- Social assistance payments -T5007
- Workers' compensation -T5007
- Any other information slips

Receipts and Expenses

- Medical expenses
- Transit passes
- Charitable donation
- Political contributions
- Child care expenses
- Adoption expenses
- Children's arts and sports program
- Moving expenses
- Interest paid on student loans
- Carrying charges
- Interest expenses
- Office – in-home expenses
- Exams for professional certification
- RRSP contribution slip
- Child Support expense/Income
- Spousal Support
- Professional or union dues
- Tool expenses (Tradespersons)

Other documentation

- Notice of Assessment/Reassessment including any correspondence with CRA.
- Rental income and expense records
- Business, farm or fishing income/expenses
- Sale or deemed sale of stocks, bonds or real estate
- Automobile / Travel logbook and expenses
- Disability Tax Credit Certificate
- Volunteer Firefighters certification

Authorization

- Electronic Filing of T1 Return-T183
- Authorizing or Cancelling a Representative-T1013