

PERSONAL TAX CHECKLIST

Income

- Employment income (T4)
- Interest, dividends (T3, T5, T5008)
- Business income & expenses
- Rental income & expenses
- Pension income (T4A, T4AOAS, T4AP)
- RRSP and RIF income (T4RSP, T4RIF)
- Employment insurance (T4E)
- Social assistance & WCB benefits (T5007)
- Other income not reported above

Other information

- Sale of principal residence
- First time home buyer
- Additional dependants in current year
- Marital status change
- Foreign property over \$100,000
- GST returns for registrants

Receipts

- RRSP contributions
- Employment expenses (T2200 signed by employer)
- Work from home expense Covid-19 (T2200S)
- Tool expense for tradesperson
- Union dues not included on T4 slip
- Teacher school supplies
- Childcare expenses
- Support payments paid or received
- Medical expenses & medical travel details
- Attendant & nursing home fees
- Charitable donations
- Northern residence deduction
- Digital news subscription
- Political contributions
- Moving expenses for work at new location
- Home buyer amount (first time home)
- Tuition expenses (T2202)
- Student loan interest
- Disability tax credit (T2201)