



PERSONAL INCOME TAX RETURN CHECKLIST

This is a personal tax checklist to help guide you in assembling documentation and items needed for the preparation of your personal tax return. This list is not all inclusive as certain items will be specific to individual circumstances and situations. If additional information is needed, a representative from our office will contact you.

TAX SLIPS & INCOME

- T3 – Income from Trust Allocations
- T4 – Employment Income
- T4A – Commission Income
- T4A – Pension Income
- T4A(P), T4A(OAS) – OAS & CPP Benefits
- T4E – Employment Insurance
- T4FHSA – First Home Savings Account Income
- T4PS – Profit Sharing Plan
- T4RSP – Registered Retirement Savings Plan
- T4RIF – Registered Retirement Income Fund
- T5 – Investment Income
- T5013 – Partnership Income
- T5007 – Social Assistance
- T5008 – Income from Securities Transactions
- Spousal Support Payments Received
- Scholarships / Bursaries
- Income from Crypto-asset sales
- QSBC share disposition
- Self-Employed Income
- Rental Property Income & Expenses

ADDITIONAL DOCUMENTS

- Automobile/Mileage Logbook
- Capital Gains/Losses Records
- CRA Correspondence (if applicable)

DEDUCTIONS & TAX CREDITS

- Charitable Donations
- Medical Expenses
- Disability Tax Credit (T2201)
- RRSP Contributions
- Employment Expenses (T2200)
- Office-In-Home Expenses (if allowable)*
- Union Dues or Professional Fees
- Childcare Expenses
- Tuition & Enrollment Certificate (T2202)
- Student Loan Interest Payments
- Spousal Support Payments Paid (if allowable)*
- Moving Expenses (if allowable)*
- Carrying Charges & Interest Expenses (if allowable)*
- FHSA First Home Savings Account
- Political Donations Receipts
- Multigenerational home renovation tax credit
- Clergy residence deduction
- Volunteer firefighter's amount (VFA) and search and rescue volunteers' amount (SRVA)
- Tool expenses (Tradespersons – if allowable)*

*For any (if allowable) sections, please contact our office if you have questions about the eligibility of the claim