

T1 - Personal Income Tax Checklist

YOUR SUCCESS IS OUR BUSINESS

Use this handy checklist to **save time** and help gather your tax information!

<p>Have you included the following?</p> <p>_____</p> <p>✓ Employment Income:</p> <p><input type="checkbox"/> T4</p> <p><input type="checkbox"/> T4A</p> <p><input type="checkbox"/> T4PS</p> <p>✓ Employment Expenses:</p> <p><input type="checkbox"/> T2200 plus a list of expenses Vehicle Mileage Log % Home office use</p> <p>✓ Pension Income:</p> <p><input type="checkbox"/> T4A</p> <p><input type="checkbox"/> T4AOAS</p> <p><input type="checkbox"/> T4AP</p> <p><input type="checkbox"/> T4RIF</p> <p><input type="checkbox"/> T4RSP</p> <p>✓ Investment Income:</p> <p><input type="checkbox"/> T3</p> <p><input type="checkbox"/> T5</p> <p><input type="checkbox"/> T5008</p> <p><input type="checkbox"/> T5013</p> <p><input type="checkbox"/> Foreign Income Report</p> <p>✓ Capital Gains:</p> <p><input type="checkbox"/> T5013</p> <p><input type="checkbox"/> Gain / Loss summaries from Brokers</p> <p><input type="checkbox"/></p> <p>✓ Other:</p> <p><input type="checkbox"/> New Baby</p> <p><input type="checkbox"/> Recently turned 60, 65 (CPP)</p> <p><input type="checkbox"/> 70, 71 (RRSP)</p> <p><input type="checkbox"/> Sale of principle residence/real estate</p> <p><input type="checkbox"/> Investment in Crypto currencies</p>	<p>Change of address: Change in marital status or last name</p> <p>✓ Other Income:</p> <p><input type="checkbox"/> Rental income and expense information</p> <p><input type="checkbox"/> Self-Employment income and expense information (CPP contributions / EI premiums)</p> <p><input type="checkbox"/> Home office expenses</p> <p><input type="checkbox"/> Motor vehicle expenses / New motor vehicle purchase</p> <p><input type="checkbox"/> Other business expenses</p> <p>✓ Deductions and Credits:</p> <p><input type="checkbox"/> RRSP (must be official receipts)</p> <p><input type="checkbox"/> Union/Professional dues</p> <p><input type="checkbox"/> Child care receipts</p> <p><input type="checkbox"/> Moving expenses</p> <p><input type="checkbox"/> Spousal support payments</p> <p><input type="checkbox"/> Investment advice and accounting fees paid</p> <p><input type="checkbox"/> Interest on investment loans</p> <p><input type="checkbox"/> RRSP Home Buyers Acct</p> <p><input type="checkbox"/> RRSP Life long learning</p> <p><input type="checkbox"/> Adoption or Fertility exp</p> <p><input type="checkbox"/> Disability supports deduction</p> <p><input type="checkbox"/> Caregiver/disability amount</p> <p><input type="checkbox"/> Student Loan interest slips</p> <p><input type="checkbox"/> Tuition fees - T2202/2202A/TL11A</p> <p><input type="checkbox"/> Medical/Dental/Optical receipts (less any reimbursements from Insurance)</p> <p><input type="checkbox"/> Donations (must be official receipts)</p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/> Instalment payments to CRA</p> <p><input type="checkbox"/> Labour sponsored funds</p> <p><input type="checkbox"/> T5006/EVCC3</p>
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