

PERSONAL INCOME TAX CHECK LIST

Income Receipts

- ☐ All T4 slips (Employment income), T4A (Commission Income)
- ☐ Interest, dividends, mutual funds (T3, T5) (interest from bank)
- ☐ Tuition / education receipts (T2202)
- ☐ Old Age Security and CPP benefits (T4A-OAS, T4AP)
- ☐ Other pensions and annuities (T4A)
- ☐ Social assistance payments (T5007), Workers' compensation benefits (T5007)
- ☐ Capital Gain/Loss from sale of shares (T5008).
- ☐ T4RSP (RRSP withdrawal slip)
- ☐ Any other documentation pertaining to income.

Expenses

- ☐ Tool expenses (Trades persons)
- ☐ Medical expenses (if total is more than 3% of your income)
- ☐ Childcare expenses (if services provided by an individual at home, her SIN is required)
- ☐ Adoption expenses
- ☐ Moving expenses (if you move over 40KMs for the job, business, or education)
- ☐ Carrying charges, interest expenses and broker fee paid for investments.
- ☐ Office – in-home expenses (employees who normally work from home, should have T2200 from their employer. If you work from home due to Covid you may be eligible for a fixed \$500 credit. Please let us know about your situation.
- ☐ Exams for professional certification
- ☐ Professional or union dues
- ☐ RRSP contribution slips (March–December 2022 and first 60 days of 2023)
- ☐ Digital news subscription expenses

Others

- ☐ Support payment made or received for a child, spouse or common-law partner
- ☐ Interest paid on student loans
- ☐ If your children are transferring their tuition fees to you, get their T2202s signed from them
- ☐ Rental income and expense records (please ask for Rental Checklist from us)
- ☐ Small and/or home-based Business Income and Expenses (please ask for Business Income/Exp. Schedule from us)
- ☐ Automobile / Travel logbook and expenses (in case of small business or trade)
- ☐ Sole proprietorships should let us know if they have done any qualifying ventilation upgrades.
- ☐ Disability Tax Credit Certificate. (if this is your first year claiming your own or dependant's disability)
- ☐ Details regarding RRSP Home Buyers' Plan withdrawals and repayments
- ☐ Details regarding RRSP Lifelong Learning Plan repayments
- ☐ Details of the disposition of your principal residence in 2023
- ☐ Details of foreign property (real estate or assets) worth more than CAD \$100,000, owned at any time in 2023 or if you own an interest in a foreign affiliate in 2022.
- ☐ If claiming Employment related expense, please provide Declaration of Conditions of Employment (T2200) signed by your employer.
- ☐ Volunteer Firefighters certification
- ☐ If you and your spouse have purchased your first home in 2023, please let us know, you might be eligible for First Time Home Buyer's Credit

**Let Us Know As Per Specific Situation
Please Contact**