

Personal Income Tax Return Checklist - 2018

This checklist is for: _____

Please check off each item below that is applicable to you, provide details/documentation where appropriate and return the completed checklist, together with the documentation to our office. Please note that while we may not require all receipts, forms and statements in order to file your tax return, Canada Revenue Agency expects documented support for all deductions taken and may request this information at a later time. In addition, this is not intended to be a complete list. Please provide details of any other income or expense not listed above.

Income Items

- T3 – Trust Income Allocation and Designations
- T4 – Statement of Remuneration Paid
- T4A – Pension, Retirement, Annuity and Other Income
- T4(OAS) – Old Age Security
- T4A(P) – Canada Pension Plan
- T4E – Employment Insurance Benefits
- T4RSP – RRSP Income
- T4RIF – RRIF Income
- T5 - Investment Income
- T5007 – Statement of Benefits
- T5008 – Securities Transactions
- T5013 – Statement of Partnership Income
- Partnership Statements
- Foreign pension income
- Investment income not on slips (Interest, Dividends, Capital Gains)
- Any other tax slips or income received (NR4, T5006 etc.)
- Statement of Universal Child Care Benefit (UCCB) RC62

Deductions / Tax Credits

- RRSP contributions
- Union or professional dues
- Childcare expenses (please provide details including Social Insurance Numbers of Individuals)
- Investment expenses and carrying charges (e.g. Interest expenses, investment counsel fees, safety deposit box fees etc. related to business or investments)
- Alimony paid
- Moving expenses (if move brought you 40 kms closer to workplace or school)
- Employment expenses (including Home office and Automobile, requires signed form T2200)
- Prior Year Losses
- Stock Options
- Other (including pension splitting, legal fees, etc.)
- Spouse (please provide details including SIN, date of birth, income and deductions)
- Dependents (please provide details including SIN, date of birth and net income)

- Medical expenses (please provide all receipts and reimbursements from medical plans)
- Disability
- Tuition fees (requires signed form T2202A or receipt from educational institution)
- Student loan interest forms
- Public transit passes receipts
- Children's arts tax credit receipts
- Charitable donation and gift receipts
- Political donation receipts
- Tax installments (please provide details)
- Property taxes or rent paid (please provide details)
- First time Home buyer's amount (for home purchased after Jan 27/09)
- Adoption expenses

Other

- Previous Year's Tax Return
- Previous Year's Notice of Assessment
- Investment income not on slips (Interest, Dividends, Capital Gains)
- Statement of Universal Child Care Benefit (UCCB) RC62
- Alimony/Spousal support received
- Partnership Statements
- Rental property income and expenses
- Self-Employment Income and expenses (including home office and automobile expenses)
- Business or professional income and expenses
- Details of assets/property sold during the year (stocks and bonds sold outside RRSP, real estate, books equipment etc) including documentation with cost
- Other income (including RRSP withdrawal, foreign pension income)