



PERSONAL TAX RETURN CHECKLIST

INCOME

Check if Applicable

1. Salary T4 / T4PS
2. OAS Pension T4A(OAS)
3. CPP Pension T4A(P)
4. Other pensions T4A
5. Business income
Schedule and attached T2125
6. EI Benefits T4E
7. Universal Child
Care Benefit RC62
8. Interest/dividends T5 or T3
9. Capital gains and losses T3 or
schedule
10. RRSP/RRIF T4RSP/T4RIF
11. Rental income Schedule T776
12. Alimony Schedule
13. Foreign pension Statement
14. Foreign income Statement
15. Partnership income T5013 or Stmt
16. Scholarships T4A

(If you receive any slips after your T1 has been filed please inform us)

DEDUCTION

Check if Applicable

1. RRSP deduction receipts
2. Professional dues
3. Child care (Need SIN# if
Individual)
4. Moving expenses (if moving >
40km for employment)
5. Alimony (**in first year need
spouse's SIN and copy of legal
agreement**)
6. Carrying charges (includes
accounting fees, investment counsel
fees and interest on investment

loans)

7. Medical expenses not reimbursed
(includes private insurance and
travel premiums)
8. Charitable and political donations
9. Tuition fees (if transferring to other
family member have student sign
back of T2202)
10. Statement of interest on student
loans
11. Statement of instalments paid
12. Tax shelters T101, T5013, T5003
13. If employed and eligible to deduct
expenses, schedule of expenses
and T2200
14. For proprietors or partners a
schedule of revenue and expenses,
business and personal mileage and
home office expenses
15. First Time Home Buyer's tax credit
Let us know if you are a first time
home buyer
16. Home accessibility expenditures
receipts
17. Lawyers records of sale of any real
estate and purchase date and cost.

Note that worldwide income must be reported on your Canadian tax return.

Please supply us with a copy of your 2019 Notice(s) of Assessment if we did not prepare your 2019 Income tax return.

Your return will only be Efiled on receipt of the signed T183 form authorizing us to transmit the return.

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