



## Personal Tax Checklist

Keep a copy of this checklist in your Current Year Tax file to simplify gathering all your papers in preparation for your tax return. This checklist is to be used as a guide in order to help you organize your papers for tax time.

<b>Documents</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Auto / Travel Logbooks</li><li><input type="checkbox"/> Canada Revenue Agency Correspondence</li><li><input type="checkbox"/> Installment payments</li><li><input type="checkbox"/> Notice of Assessment (last years)</li><li><input type="checkbox"/> Any Reassessment Notices during the year</li><li><input type="checkbox"/> T2200 - Declaration of Conditions of Employment (signed by employer)</li></ul> <b>Personal Income</b> <ul style="list-style-type: none"><li><input type="checkbox"/> T4 - Employment Income</li><li><input type="checkbox"/> T4 RIF – RRIF Income</li><li><input type="checkbox"/> T4 RSP – RRSP Income</li><li><input type="checkbox"/> T4A – Pension and other income</li><li><input type="checkbox"/> T4A (OAS) – Old Age Security</li><li><input type="checkbox"/> T4A (P) – CPP Benefits</li><li><input type="checkbox"/> T4E - Employment Insurance Benefits</li><li><input type="checkbox"/> T5007 – Social Assistance/WCB</li><li><input type="checkbox"/> RC 62 – Universal Child Care Benefit</li></ul> <b>Investment Income</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Capital Gains/Losses</li><li><input type="checkbox"/> Foreign Income</li><li><input type="checkbox"/> Rental Income</li><li><input type="checkbox"/> T3 – Estate/Trust/Mutual Funds Income</li><li><input type="checkbox"/> T3/T5 – Interest and Dividend Income</li><li><input type="checkbox"/> T5008 – Statement of Security Transactions</li><li><input type="checkbox"/> T5013 Limited Partnership Income</li><li><input type="checkbox"/> T600 – Canada Savings Bonds</li><li><input type="checkbox"/> Statement of Securities Sold???</li></ul> <b>Other Income</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Scholarships/Bursaries \$ _____</li><li><input type="checkbox"/> Self Employed Income (use checklist)</li><li><input type="checkbox"/> Taxable Child Support \$ _____</li><li>Other? _____</li></ul>	<b>Deductions</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Allowable Business Investment Losses</li><li><input type="checkbox"/> Automobile Expenses</li><li><input type="checkbox"/> Capital Loss Carry Forwards</li><li><input type="checkbox"/> Child Care Expenses</li><li><input type="checkbox"/> Children Sports Activity Receipts</li><li><input type="checkbox"/> Employment Insurance Benefit Repayments</li><li><input type="checkbox"/> Interest Expenses and Carry Charges</li><li><input type="checkbox"/> Legal Fees</li><li><input type="checkbox"/> Limited Partnership Losses of Other Years</li><li><input type="checkbox"/> Medical Expenses</li><li><input type="checkbox"/> Moving Expenses</li><li><input type="checkbox"/> Non-Capital Loss Carry Forwards</li><li><input type="checkbox"/> Rental Expenses</li><li><input type="checkbox"/> RRSP Contribution Receipts</li><li><input type="checkbox"/> Safety Deposit Box Charges</li><li><input type="checkbox"/> Self-Employment Expenses (see checklist)</li><li><input type="checkbox"/> Union / Professional Dues</li><li><input type="checkbox"/> Public Transit Passes</li><li><input type="checkbox"/> Tax Installments</li></ul> <b>Tax Credits</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Attendant Care Expenses</li><li><input type="checkbox"/> Charitable Donations</li><li><input type="checkbox"/> Interest Paid on Student Loans</li><li><input type="checkbox"/> Medical Expenses</li><li><input type="checkbox"/> Property Taxes</li><li><input type="checkbox"/> Rent</li><li><input type="checkbox"/> T2201 – Disability Deduction</li><li><input type="checkbox"/> T2202 – Tuition Fees / Education Credit</li><li><input type="checkbox"/> Tax Installments</li><li><input type="checkbox"/> Working Opportunity Fund</li></ul>
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This is not intended as a complete checklist. Contact your accountant or refer to <http://www.cra-arc.gc.ca> or <http://turbotax.intuit.com/Tax-Preparation-Checklist>