

Personal Taxes Checklist

Personal Information

- Change in Address
- Update Dependent Information
- Change in Martial Status
- Property owned outside Canada *100K
- Sale of Property (Personal or Investment)

Business

- Business Expense Spreadsheet
- Details of Capital Expenses
- Access Code for HST filing
- Payroll Information

Employment Income

- T4 - Employment Income
- T4PS - Profit Sharing
- T2200 - Employment Expenses Statement
- T777 - Employment expenses
- Apprentice - Tool/Supplies bills
- Stock Options
- Professional/ Union Dues

Others

- Donations
- Medical
- Child Care Expenses
- Moving Expenses
- Meals and Lodging Deduction
- Tuition Slips
- Ontario Staycation Credit
- Ontario Seniors Care at Home Tax Credit
- Senior's Home Safety Tax Credit
- First Time Home Buyer's Tax Credit
- Digital News Subscription Tax Credit
- Eligible Educator School Supply Tax Credit
- Adoption Expenses
- Medical Expense Tax Credit (for surrogacy and other expenses)
- Rent/ Property Taxes
- Spousal/Child Support Income
- Home Buyers Plan
- T4E - Unemployment Income
- T2201 - Disability Tax Credit
- Adoption of Child Expenses
- Interest on Student Loans
- Copy of Last year's taxes and Notice of Assessment

Investment Income

- T3 - Trust Income
- T5 - Investment Income
- T5008 - Statement of Securities Transactions
- Interest Paid to earn investment income
- Management Fees
- Investment Counseling Fees
- Sale of an Investment Property

Pension Income

- RRSP Contributions Slips
- T4RSP - RRSP Withdrawal
- T4A(OAS) - Old Age Security Income
- T4AP - Canada Pension Plan Income
- T4A - Pension Income
- T4RIF – RIF Withdrawal

Rental Income

- T776 - Rental Income and Expenses
- Details of Capital Purchases