

PERSONAL INCOME TAX CHECKLIST

Here is a checklist to assist you in identifying the documents required for preparation of your income tax return.

| Please indicate [X] if applicable to you | | Please Provide |
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| Employment Income | | |
| <input type="checkbox"/> | Employment (including retiring allowances) | T4 and/or T4A slips |
| <input type="checkbox"/> | Odd jobs, tips | Pay slips, or other documents supporting amounts |
| <input type="checkbox"/> | Director's fees | Payment slips or deposit slips |
| <input type="checkbox"/> | Profit sharing income | T4PS slip |
| <input type="checkbox"/> | Loans from employer | Amount, interest rate, and terms of repayment |
| Pension, Retirement, Annuity Income | | |
| <input type="checkbox"/> | Old Age Security | T4A (OAS) |
| <input type="checkbox"/> | Canada or Quebec Pension Plan (CPP) | T4A(P) |
| <input type="checkbox"/> | Foreign (eg. U.S. Social Security) | Foreign income slips or filed US tax returns |
| <input type="checkbox"/> | Registered Retirement Income Fund | T4RIF |
| <input type="checkbox"/> | Withdrawal from a RRSP | T4RSP slips |
| <input type="checkbox"/> | Any other pension plan contributions and withdrawals (including withdrawals and repayments for the Home Buyers Plan and Life Long Learning Plan) | |
| <input type="checkbox"/> | Annuity Payments | T-slips |
| Investment Income | | |
| <input type="checkbox"/> | Interest - savings account | T5 slips |
| <input type="checkbox"/> | Term deposits or G.I.C.'s | T5 slips |
| <input type="checkbox"/> | Mutual fund investment income | T3 slips |
| <input type="checkbox"/> | Dividends - Canadian corporations | T5 slips |
| <input type="checkbox"/> | Interest - Canada Savings Bonds | T5, T600 or T600C slips, details of interest earned if no slips |
| <input type="checkbox"/> | Interest - joint account with spouse | Percentage of split |
| <input type="checkbox"/> | Interest - mortgage or other loans | Amortization schedule, summary of interest income earned |
| <input type="checkbox"/> | Foreign interest or dividends | Foreign slips or filed US tax returns |
| <input type="checkbox"/> | Interest - Treasury bills | T5 slips |
| <input type="checkbox"/> | Royalty or other investment income | T5 or T3 slips |
| <input type="checkbox"/> | Partnership income | T5013 |
| Sale / Exchange of Investments | | |
| <input type="checkbox"/> | Stocks, bonds, trust units | Capital gain and loss report from your broker or bank |
| <input type="checkbox"/> | Real estate and other properties | Sale documents and original purchase documents |
| <input type="checkbox"/> | Any properties gifted to others | Amount gifted, who they were gifted to, name(s) and address(es) |
| <input type="checkbox"/> | Bitcoin or other cryptocurrency transactions | Proceeds of sale and summary of purchase transactions (cost base) |
| Income from Self Employment / Sole Proprietorship | | |
| <input type="checkbox"/> | Revenue & expenses | Record of all revenues & expenses; we can provide a schedule of allowable expenses or you can look online for T2125. |
| <input type="checkbox"/> | Assets purchased / sold during year | Dates, original cost base, proceeds of disposition, commission fees, and legal fees |
| <input type="checkbox"/> | Any partners in self-employed income | Name(s), SIN and share (percentage of partnership) |
| <input type="checkbox"/> | Salary paid to spouse | Details of work done and total amount paid |
| <input type="checkbox"/> | Inventory | Cost of closing inventory |
| <input type="checkbox"/> | Accounts receivable and accounts payable | Listing of each |

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| <input type="checkbox"/> | Home-office | Square footage of office and total home, and home expense details/amounts such as utilities, property taxes, insurance, rent and mortgage interest. If you need a spreadsheet to document your information, please contact us. |
| Sale of Principal Residence / House | | |
| <input type="checkbox"/> | Real estate and other properties (including principal residence) | Please provide the proceeds of disposition, a description of the property, and the year the property was acquired. |
| Rental Income | | |
| <input type="checkbox"/> | Rental income & expense | Details of all revenue & expenses; if you require a list of deductible expenses we can provide you with this, or you can download the T776 from the CRA website. |
| <input type="checkbox"/> | New properties | Purchase agreement |
| <input type="checkbox"/> | Rental of part of residence | Details of split |
| <input type="checkbox"/> | Change of use of rental property | Date of change in-use, appraised value on that date |
| <input type="checkbox"/> | Sale of rental property | Sale documents and original purchase documents |
| Other Income | | |
| <input type="checkbox"/> | Employment Insurance Benefits | T4E slip |
| <input type="checkbox"/> | WCB benefits | T4, T5007, details |
| <input type="checkbox"/> | Social assistance payments | Amounts received and/or any T-slips received |
| <input type="checkbox"/> | Alimony or child support received | Separation agreement, stating amounts paid in 2025 |
| <input type="checkbox"/> | Scholarships, bursaries | T4A slip(s) |
| Employment Related Expenses | | |
| <input type="checkbox"/> | Declaration of conditions of employment | Form T2200 signed by employer |
| <input type="checkbox"/> | Home Office | If you receive a T2200 from your employer you can deduct a portion of your home expenses including utilities and rent. Please provide the details of your expenses plus the square footage of your office and total square footage of your home. |
| <input type="checkbox"/> | Travel/Auto | Records of expenses and calculation of business mileage |
| <input type="checkbox"/> | Moving expenses | Receipts from the move, a letter from the employer stating move was required for employment |
| <input type="checkbox"/> | Cell phone | Summary of cell phone charges for employment |
| <input type="checkbox"/> | Union or Association Dues | Official tax receipts |
| Commission Related Expenses | | |
| <input type="checkbox"/> | Home-office | Form T2200 & details of area used and (Note: Mortgage interest is not deductible as an employment expense) |
| <input type="checkbox"/> | Travel/Auto | Summary of expenses and calculation of business portion of use |
| <input type="checkbox"/> | Sales expenses | Summary of expenses |
| Investment Expenses | | |
| <input type="checkbox"/> | Borrow money to earn invest. income | Summary of interest related to investments |
| <input type="checkbox"/> | Borrowed on margin account (stocks) | Summary of interest paid related to the account |
| <input type="checkbox"/> | Accounting fees to record income | Invoices relating to the expense |
| <input type="checkbox"/> | Investment counsel and investment management fees | Invoices or summary of fees |
| <input type="checkbox"/> | Tax shelters | Purchase documents |
| Other Deductions and Credits | | |
| <input type="checkbox"/> | Alimony or separation allowance paid | Record of payment & details |
| <input type="checkbox"/> | Professional dues | Name of organization, amount of dues, date of payment |
| <input type="checkbox"/> | Tuition fees over \$100 paid (post- | Forms T2202, TL11A, B, C, and D where applicable |

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| | secondary) | |
| <input type="checkbox"/> | Interest paid on qualifying student loans | Statement indicating interest amount |
| <input type="checkbox"/> | Registered Retirement Savings Plan | Official RRSP contribution tax receipt |
| <input type="checkbox"/> | Stocks/bonds rolled over into RRSP | Official RRSP contribution tax receipt, details |
| <input type="checkbox"/> | Donations to registered charities | Official donation tax receipts from the charity |
| <input type="checkbox"/> | Unused prior year donations | Included on prior year tax return |
| <input type="checkbox"/> | Amounts paid for child care | Details of payments for each child |
| <input type="checkbox"/> | Medical Expenses, (only if in excess of the lessor of 3% of net Income or \$2,302) | Receipts, itemized details |
| <input type="checkbox"/> | Political Contributions paid | Official tax receipts |
| <input type="checkbox"/> | Loss on shares of or loss on loans to a private company | Proceeds of disposition and original cost of investment |
| <input type="checkbox"/> | Self or dependant attend University | Form T2202 or T2202A signed T2202 by dependant if tuition amount is transferred from dependant to the parent |
| <input type="checkbox"/> | Disability Credit | Form T2201 (first year) As of March 22, 2017, nurse practitioners have been added to the list of medical practitioners who may certify eligibility of a person for the DTC. |
| <input type="checkbox"/> | Incurred disability support costs | Full details, Form T929 - (speech, sight, hearing, learning aids for impaired individuals and attendant care expenses) |
| <input type="checkbox"/> | Contribute to support of relative | Details of the relationship status and payments of supporting amount |
| <input type="checkbox"/> | Parent or parents (over 65) live with you | As of 2017, caregiver amount is not available for non-infirm seniors who reside with their adult children or grandchildren. |
| <input type="checkbox"/> | Non-resident dependants supported | Payments to non-resident dependants and summary of their global income. |
| <input type="checkbox"/> | Oil & Gas, Mining investments | Investment statements or agreement. T-slips or payments from Oil & Gas, Mining companies |
| <input type="checkbox"/> | Canadian Feature Films, Videos | Completed form T1131 |
| <input type="checkbox"/> | Scientific research and experimental development (SRED) expenses | Details of your SR&ED expenditures and investment tax credit |
| <input type="checkbox"/> | Tools acquired by tradespersons and eligible apprentice mechanics | Total cost of eligible tools that you bought in 2025 and income from employment as a tradesperson for the year |
| <input type="checkbox"/> | Adoption expenses | A copy of the adoption order and a form of the adoption expense |
| <input type="checkbox"/> | Canada Caregiver Amount | T2201 (Disability Tax Credit Certificate) |
| <input type="checkbox"/> | First-Time Home Buyer's Tax Credit (HBTC) | First-time home buyers who acquire a qualifying home can claim a non-refundable tax credit. Please indicate whether you are a first-time home buyer. |
| <input type="checkbox"/> | Home accessibility tax credit | Certain expenditures (up to \$20,000) may be eligible for a tax credit if made in relation to a renovation or alteration of your home to enhance mobility or reduce the risk of harm for an individual who is either, eligible for the Disability Tax Credit, or 65 years of age or older at December 31, 2025 |
| <input type="checkbox"/> | Eligible Educator School Supply Tax Credit | If you are a teacher or early childhood educator, please provide receipts (up to \$1,000) for eligible school supplies purchased in the year. |