

PERSONAL INCOME TAX RETURN CHECKLIST



LAST YEAR'S NOTICE OF ASSESSMENT

INCOME

Self-Employment Income

Any T3, T4, T5's

CAPITAL GAINS

T5013

Trading summaries from Brokers

Annual statement from Mutual Funds

OTHER INCOME

Rental income and expense information

DEDUCTIONS & CREDITS

Self-employment expense information (**Easy! Just print off your software's year end totals!**)

RRSP (must be official receipts)

Child care receipts

Children's fitness amount

Children's arts amount

Adoption expenses

Support payment information

Disability support information

Caregiver/disability amount

Moving expenses

Tuition fees – T2202/2202A

Student loan interest slips

Union/professional dues

Labour sponsored funds – T2006/EVCC30

Monthly bus passes

Home buyers account

Investment advice and accounting fees paid

Interest on investment loans

Safety deposit box fees

Donations (must be official receipts)

Installment payment information

Medical/Dental/Optical receipts (less any reimbursements from insurance)

Premiums paid to Private/Travel Medical Insurance plans