



---

**PERSONAL INCOME TAX CHECKLIST**

**Income Items:**

- Previous year's tax return
- Previous year's Notice of Assessment
- All information slips (example: T4, T4A, T4A(OAS), T5, T3, T5007)
- Investment income not on slips (Interest, Dividends, Capital Gains)
- Alimony/Spousal Support received
- Partnership statements
- Rental property income and expenses
- Business or professional income and expenses
- Sale of property including books, bonds, and real estate - provide details
- Other income (example: RRSP withdrawal, foreign pension income)

**Deductions:**

- RRSP contributions
- Union or professional dues
- Childcare expenses - Form T778
- Interest expenses related to business or investments
- Safety Deposit Box
- Alimony or Child Support
- Moving expenses
- Employment expenses (Automobile or Home Office) - You require a signed **T2200 Form\***
- Stock Options
- Prior year losses
- Other (e.g. pension splitting, legal fees, etc.)

**Tax Credits:**

- Spouse - provide Social Insurance Number, Date Of Birth, income and deductions
- Dependents - provide Social Insurance Number, Date Of Birth and net income
- Medical Expenses
- Disability
- Tuition fees - Form T2202A signed by student
- Charitable donations
- Political donations
- Tax installments - TD7 slips or details
- Property taxes or rent paid - provide details

**Other Notes:**

\* The T2200 Declaration of Conditions of Employment form can be found on the [Canada Revenue Agency's website](http://Canada Revenue Agency's website). Get your FREE Adobe Acrobat Reader to view this form at [www.adobe.com](http://www.adobe.com)