

Personal Income Tax Return Checklist

1. **All information slips such as:**

- | | |
|------------------------------------|--|
| <input type="checkbox"/> T-3 | <input type="checkbox"/> T-100 |
| <input type="checkbox"/> T-4 | <input type="checkbox"/> T101 |
| <input type="checkbox"/> T-4A | <input type="checkbox"/> T600 |
| <input type="checkbox"/> T-4 (OAS) | <input type="checkbox"/> CTB |
| <input type="checkbox"/> T-4E | <input type="checkbox"/> T5003 |
| <input type="checkbox"/> T4F | <input type="checkbox"/> T5007 |
| <input type="checkbox"/> T4PS | <input type="checkbox"/> T5008 |
| <input type="checkbox"/> T4RIF | <input type="checkbox"/> T5013 |
| <input type="checkbox"/> T4RSP | <input type="checkbox"/> T5018 |
| <input type="checkbox"/> TL11A | <input type="checkbox"/> T5018 (SUBCONTRACTORS) |
| <input type="checkbox"/> T-5 | <input type="checkbox"/> And corresponding provincial slip |
| <input type="checkbox"/> T-10 | |

2. **Details of other income for which no T slips have been received such as:**

- other employment income (including stock option plans)
- business income
- partnership income
- rental income
- alimony, separation allowances, child maintenance
- pensions
- interest income earned but not yet received – example: *Canadian Savings Bonds, Deferred Annuities, Term Deposits, Treasury Bills, Mutual Funds, Strip Bonds, Compound Interest Bonds*
- professional fees
- director fees
- scholarships, fellowships, and bursaries
- replacement properties acquired

3. **Details of other expenses such as:**

- employment related expenses - provide form T2200 "Declaration of Conditions of Employment"
- interest on money borrowed to purchase investments
- investment counsel fees
- tools acquired by apprentice vehicle mechanics
- business and employment purchases like vehicles, supplies, etc.
- moving expenses – including costs of maintaining a vacant former residence
- child care expenses
- alimony, separation allowances, child maintenance
- safety deposit box fees
- accounting fees
- pension plan contributions

- business research and development
 - clergy residence deduction information including Form 1223
4. **Details of other investments such as:**
- real estate or oil and gas investments – including financial statements
 - labour-sponsored funds
 - Registered Education Savings Plans
5. **Details and receipts for:**
- Registered Retirement Savings Plan contributions
 - professional dues
 - tuition fees – From T2202, TL11A, TL11D
 - charitable donations
 - medical expenses (including medical related modifications to new or exiting homes and travel expenses)
 - political contributions
 - home renovation receipts
 - eligible fitness expenses
 - adoption expenses
 - amount paid for monthly public transit
6. **Details of:**
- capital gains and losses realized (including actual date of disposition)
7. **Details of:**
- previous capital gains exemptions claimed, business investment losses and cumulative net investment loss accounts
8. **If one your dependents was in full time attendance at a college or university:**
- details concerning name of institution, number of months in attendance, tuition fees, income of dependent, Form T2202
9. **Are you disabled or are any of your dependents disabled?**
- provide Form T2201 – disability tax credit certificate
10. **Details regarding RRSP:**
- Home Buyers' Plan withdrawals
 - Lifelong Learning Plan repayment
11. **Information regarding child tax credit receipts**
12. **Receipts for:**
- income tax installments, or
 - payments of tax

13. **Assessment Notice and any other correspondence from Revenue Canada, Taxation**
14. **Personalized Tax Information which Revenue Canada may have sent to you**
15. **Details of foreign property owned at any time including cash, stocks, trusts, partnerships, real estate, tangible and intangible property, contingent interests, convertible property etc.**
16. **Details of income from, or distributions to, foreign entities such as foreign affiliates and trusts**
17. **If you provided in-home care for a parent or grandparent (including in-laws) 65 years of age or over, or an infirm dependent relative, a federal tax credit is available**

Also, the caregiver may claim related training costs as a medical expense credit.
18. **Interest paid on qualifying student loans is eligible for a tax credit**
19. **Details of carry forwards from previous years including losses, donations, forward averaging amounts, registered retirement savings plans**

Young Parkyn McNab LLP

Chartered Accountants