



Accounting and Tax Services

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Canadian Personal Income Tax Checklist

Print out this handy checklist or save a copy to your computer to use digitally and make updates as needed.

Income

T4 slips
T4A (pensions, CPP, OAS)
T4E (unemployment insurance benefits)
T3 (trust income)
T5 (interest and dividends)
RC 62 (universal child care benefits)
RRSP/RIF
Rental Income and Expenses
Self-Employment Income and Expenses ([contact us](#)
to discuss maximizing your deductions)
Other Income (interest, WSIB, alimony received,
grants, scholarships, etc.)

Deductions/Credits

T2202 (tuition receipts)
T2200 Employment expenses (signed by employer)
RRSP Contributions
Union & Professional Dues
Child Care Expense
Charitable Donations
Medical Expenses
Child Fitness/Arts Receipts
Moving Expenses
Rent paid (showing to whom paid)
Property Taxes paid in year
Other (carrying charges, interest costs on
investments, safety deposit box, alimony paid,
interest on student loans, transit passes, investment
counsel fees)

Other Information Needed

Copy of previous year's Notice of Assessment
Income tax installments, final statement indicating
total paid for year
Copy of previous year's tax return (new tax clients)