

INDIVIDUAL - TAX CHECKLIST

Bringing Key Records to Your CPA/CGA

Name: _____

INCOME	DEDUCTIONS – GENERAL	DEDUCTIONS – EMPLOYEES	UNINCORPORATED BUSINESSES
<input type="checkbox"/> Employment income (All T4 Slips)	<input type="checkbox"/> RRSP contributions	<input type="checkbox"/> Conditions of employment form (T2200)	<input type="checkbox"/> Total sales for the year
<input type="checkbox"/> Investment income (T5)	<input type="checkbox"/> Medical expenses	<input type="checkbox"/> Home office expenses	<input type="checkbox"/> Total expenses by category
<input type="checkbox"/> Pension income (T4A, T4A(P), T4RIF, T4RSP)	<input type="checkbox"/> Private health plan payments	<input type="checkbox"/> Business portion (Area)	<input type="checkbox"/> Capital assets acquired
<input type="checkbox"/> Employment insurance (T4E)	<input type="checkbox"/> Child care expenses	<input type="checkbox"/> Rent/Mort interest paid	<input type="checkbox"/> Home office/Vehicle expenses
<input type="checkbox"/> Trusts income-mutual fund investments (T3)	<input type="checkbox"/> Charitable donations	<input type="checkbox"/> Utilities	RENTAL PROPERTIES
<input type="checkbox"/> Old age security/ CPP benefits (T4OAS)	<input type="checkbox"/> Political contributions receipts	<input type="checkbox"/> Insurance	<input type="checkbox"/> Address and number of units
<input type="checkbox"/> Income from partnerships (T5013)	<input type="checkbox"/> Tuition/education amount (T2202A)	<input type="checkbox"/> Property taxes	<input type="checkbox"/> Rental income by unit
<input type="checkbox"/> Social assistance payments (T5007)	<input type="checkbox"/> Interest paid on student loans	<input type="checkbox"/> Commission sales-person	<input type="checkbox"/> Rental expenses by unit/category
<input type="checkbox"/> Workers compensation	<input type="checkbox"/> Child/Spousal support payments	<input type="checkbox"/> Advertising/Promotion	<input type="checkbox"/> Motor vehicle expenses
<input type="checkbox"/> RRSP Withdrawals	<input type="checkbox"/> Moving expenses	<input type="checkbox"/> Meals & Entertainment	<input type="checkbox"/> Partners' names, addresses and SINS
<input type="checkbox"/> Rental Income	<input type="checkbox"/> Interest charges/Safety deposit	<input type="checkbox"/> Motor vehicle expenses	<input type="checkbox"/> Legal fees
<input type="checkbox"/> Business, Farm or Fishing Income	<input type="checkbox"/> Disability credit (T2201)	<input type="checkbox"/> Total KM/KM for work	OTHER ITEMS
<input type="checkbox"/> Spousal support payments received	<input type="checkbox"/> Property taxes/rent paid and to whom	<input type="checkbox"/> Lease payments	<input type="checkbox"/> Notice of Assessment (Prior Year)
<input type="checkbox"/> Income from foreign investments	<input type="checkbox"/> Professional dues, union dues	<input type="checkbox"/> Loan interest	<input type="checkbox"/> Tax returns (Prior Year)
<input type="checkbox"/> Details of real estate sales	<input type="checkbox"/> Adoption expenses	<input type="checkbox"/> Insurance	<input type="checkbox"/> Other years' reassessments
<input type="checkbox"/> Sale of securities such as stocks and bonds	<input type="checkbox"/> Certain Legal fees	<input type="checkbox"/> Repairs & Maint.	<input type="checkbox"/> Contact/personal details if changed
<input type="checkbox"/> (eg. trading summary from your broker)	<input type="checkbox"/> Tool expenses (tradesperson)	<input type="checkbox"/> Gas & Fuel	<input type="checkbox"/> Details of foreign property
<input type="checkbox"/> All other income	<input type="checkbox"/> First time home buyers	<input type="checkbox"/> License & Reg.	<input type="checkbox"/> Instalment payments