

Personal Tax Checklist

Personal Information

- Social Insurance Number
- Date of Birth
- Current Address
- Marital Status
- Social Insurance Number and Date of Birth for Spouse & Dependant Children
- Spouse Income
- Disposal of Primary Residence
- Foreign Property Costing More Than \$100,000

Income

- Employment Income T4
- Old Age Security Pension T4A(OAS)
- CPP Benefits T4A(P)
- Disability Benefits T4A(P)
- Other Pensions and Superannuation T4A, T4RIF, T5, T3
- Split Pension Amount
- Employment Insurance and Other Benefits T4E
- Dividend, Interest, and Investment Income T5
- Partnership Income T5013
- RRSP Income T4RSP
- Rental Income (See Section Below)
- Support Payments Received
- Taxable scholarships, fellowships, bursaries, and artists' project grants T4A
- Self Employment Income (See Section Below)
- Workers Compensation Benefits T5007

Rental Income

- Address of Property
- Number of Units
- Annual Rental Income Per Unit
- Personal Use Percentage – Square Footage of Personal Portion/Total Square Footage of House
- Advertising Expenses
- Home Insurance
- Mortgage Interest
- Professional Fees
- Management and Administration Fees (Property Management Fees)
- Repairs and Maintenance
- Property Taxes
- Utilities
- Motor Vehicle Expenses
- Other Expenses Related to Generating Rental Income

Self-Employed Income

- Business Name
- Business Number
- Address of Business
- Main Product or Service
- Gross Sales, Commissions or Fees
- Professional Income
- Opening Inventory, Purchases, Closing Inventory
- Advertising Expenses
- Meals & Entertainment
- Business Insurance
- Office Expenses
- Supplies
- Professional Fees

- Management and Administration Fees
- Rent
- Repairs and Maintenance
- Salaries & Wages
- Business Commercial Taxes
- Travel Expenses
- Utilities
- Delivery & Freight
- Motor Vehicle Expenses
 - Make, Model and Year
 - Business Kilometers and Total Kilometers
 - Fuel & Oil
 - Interest
 - Insurance
 - License & Registration
 - Maintenance & Repairs
 - Lease Information
- Business-Use-of-Home Expenses
 - Area of Home Used for Business – Square Footage
 - Property Taxes
 - Utilities
 - Home Insurance
 - Mortgage Interest
 - Maintenance

Deductions

- RRSP Contributions
- Split Pension Amount
- Annual, Union, Professional or Like Dues
- Childcare Expenses
- Disability Supports Deduction
- Business Investment Loss

- Moving Expenses
- Support Payments Made
- Carrying Charges and Interest Expenses
- CPP Contributions
- Other employment Expenses

Non-Refundable Tax Credits

- Basic Personal Amount
- Age Amount
- Spouse or Common-Law Partner Amount (Spouses net income is less than basic personal amount)
- Eligible Dependent
- Canada Caregiver Amount
- CPP Contributions
- Other employment Expenses
- Volunteer Firefighters' Amount
- Search & Rescue Volunteers' Amount
- Home Buyers Amount
- Home Accessibility Expense
- Adoption Expenses
- Digital New Subscriptions
- Disability Amount
- Disability Transferred from a Dependant
- Interest Paid on Student Loans
- Tuition, Education, and Textbook Amounts
- Tuition Transferred from Child
- Medical Expenses