

Personal tax return checklist

This is the list of documents you are most likely to need to have your personal tax return prepared. Please note, it is not an exhaustive list.

Type of document	✓
Income Documents:	
Employment Income (T4, T4PS)	<input type="checkbox"/>
Dividends and Interest (T5)	<input type="checkbox"/>
Mutual Funds (T3)	<input type="checkbox"/>
Employment insurance (T4E)	<input type="checkbox"/>
Pension/Old Age Security (T4AP, T4A-OAS)	<input type="checkbox"/>
CERB, Scholarship, RESP, Other income (T4A)	<input type="checkbox"/>
Social Assistance Payments (T5007)	<input type="checkbox"/>
RRPS, RRIF (T4RSP, T4RIF)	<input type="checkbox"/>
Sale of stocks (T5008)	<input type="checkbox"/>
Rental Income statement	<input type="checkbox"/>
Business Income Statement	<input type="checkbox"/>
Foreign Pension Income	<input type="checkbox"/>
US income – please provide full 1040 return	<input type="checkbox"/>
US Interest/Dividends (1099)	<input type="checkbox"/>
Alimony (either income or expense)	<input type="checkbox"/>
Expenses/Deductions:	
Tuition slips (T2202A)	<input type="checkbox"/>
Work from home Expenses (or T2200)	<input type="checkbox"/>
Disability Tax credit (T2201)	<input type="checkbox"/>
Interest paid on student loans	<input type="checkbox"/>
RRSP Contributions	<input type="checkbox"/>
Union/Professional Dues	<input type="checkbox"/>
Child Care Expenses	<input type="checkbox"/>
Caregiver expenses	<input type="checkbox"/>
Donation receipts	<input type="checkbox"/>
Medical Expenses	<input type="checkbox"/>
Carrying charges	<input type="checkbox"/>
Other documents:	
Prior year's tax return	<input type="checkbox"/>
Notice of Assessment/Reassessment	<input type="checkbox"/>