Personal Tax Return Checklist

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Personal information

[ ] SIN for you, your spouse and dependants

[ ] Last year’s Notice of Assessment

[ ] Direct deposit banking information

[ ] Change of address, marital status or new children

[ ] Newcomers: date of arrival in Canada

Income slips

[ ] T4 (employment)

[ ] T4A, T4A(P), T4A(OAS) (pensions)

[ ] T4E (EI benefits)

[ ] T5, T3, T5008 (investments)

[ ] T4RSP / T4RIF

[ ] Foreign income records

Deductions & credits

[ ] RRSP and FHSA contribution receipts

[ ] Childcare receipts (provider SIN or business number)

[ ] Medical and dental receipts

[ ] Charitable donation receipts

[ ] Tuition forms (T2202)

[ ] Union or professional dues

[ ] Moving expenses

[ ] Rent receipts or property tax (BC renter’s credit)

Self-employed & business

[ ] Sales records and invoices

[ ] Expense receipts by category

[ ] Vehicle mileage log and costs

[ ] Home office costs (rent, utilities, insurance)

[ ] GST/HST returns filed

[ ] New equipment purchases

Rental property

[ ] Rents received

[ ] Mortgage interest statement

[ ] Property tax, insurance, repairs

[ ] Purchase/sale documents if sold