

Personal Tax Return Checklist that Covers Most Required Documents and Receipts

Name
Address
Telephone
E-mail
Birth Date
SIN
Marital Status
Spouse's Name
Spouse's SIN
Spouse's Birth date
Marital status change and date of change

Employment or commission income; all T4 and T4A slips.
Old Age Security, Canada Pension Plan benefits or other pensions; T4A (OAS), T4A (P) and T4A slips.
Children or dependants (parents) who you support, Provide names, birth dates and income of all dependants.
Employment insurance benefits; T4E slip.
Interest or dividend income; T5, T3 and/or T600 slips.
Investments; T5003, T5013 slips
Rental properties; gross rental income and related expenses - property taxes, repairs and maintenance, mortgage interest, insurance, utilities, advertising and management fees.
Withdraw funds from your R.R.S.P. plan; T4RSP slip.
Scholarships, bursaries, research grants or director's fees.
Self-employed or commission income and all related business expenses.
Receive any WCB benefits or social assistance benefits; T5007 slips.
R.R.S.P. contributions.
Professional, union or association dues.
Childcare expenses; name of daycare or a person, address and or SIN of recipient.
Attendant care expenses; name, SIN and amount.
Moving expense more than 40 kms closer to place of employment or post secondary school; related moving
Paid any investment counsel fees, safety deposit charges, or accounting fees.
Any capital losses or non-capital losses carried forward from prior taxation years.
Claimed for disability amount; form T2201 has been filled.
Claim a "caregiver amount" credit for supporting other dependents; name, SIN, and net income of dependent.
Paid amount of any interest on student loans.
Attended any courses; tuition fee receipt or T2202A
Children attend post secondary courses and were unable to fully utilize their tuition fee receipts and may be able
Dental or medical expenses; receipts include eyeglasses, prescriptions, extended health insurance, travel insurance, chiropractic, hospital fees.
Charitable or political donations receipts.