

PERSONAL INCOME TAX CHECKLIST

To assist me in the preparation of your T1 income tax return, I have prepared the following checklist.
Please review this list for all the possible applicable items relating to your particular circumstances.
I also have Excel spreadsheets available to assist you in recording and totaling your income and expenses.
Check my website at www.raincoastadvisors.com to request a copy.

Personal Income Information

- Salaries and Employment Income - **T4, T4A**
- Other Employment Benefits or Income (tips etc)
- CPP Benefits - **T4A(P)**
- Old Age Security Benefits - **T4A(OAS)**
- Other Pensions or Superannuation - **T4A**
- RRSP Income - **T4RSP**
- RRIF Income - **T4RIF**
- Employment Insurance - **T4E**
- Universal Child Care Benefits - **RC62**
- WCB / Social Services Benefits - **T5007**
- Home Buyers' Plan - **T1137**
- Retirement Income - **T4RCA**

Investment Income * (worksheets available)

- Interest and Dividends - **T3, T5, T4PS**
- Statement of Security Transactions **T5008**
- Interest on Tax Refund (notice of assessment)
- Canada Savings Bonds - **T600, T5**
- Income from Mutual Funds - **T3**
- Foreign Income
- Annuities
- *Rental Income (Full details required)
- *Prepare Summary of Investment Contract Holdings
- Limited Partnership Income - **T5013**
- *Capital Gains/Losses (Full details required)

Other Income

- Alimony (details of changes / court order)
 - Taxable Child Support Received
 - Scholarships/Bursaries **T4A**
 - Other – Specify
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Other Information

- Last year's Notice of Assessment
- Summarize Installment payments
- Foreign property owned (full details required)
Total cost exceeding \$100,000
- _____

Business Income * (worksheets available)

- *Self-employed Earnings Information
- Farming/Fishing Earnings Information
- Professional Earnings Information
- Self-employed Commission Earnings Information

Non-Refundable Credits

- Tuition Fees / Education Credit - **T2202**
(note that T2202 forms commonly available online only)
- Tuition Fees / Education Credit for Child
T2202 - Child's Net income \$ _____
- Married -spouse's Net Income \$ _____
- Other Dependants Amount (Details required)
- Disability Deductions - **T2201**
- Medical Receipts (include private/group plan premiums)
- Volunteer Firefighters amount
- Public Transit Passes
- Charitable Donations
- Children's Fitness Expenses
- Political Contribution Receipts
- Dependent Changes (GST Credit & Child Tax Benefit)
- Ask us about disability claims and caring for others

Other Deductions * (worksheets available)

- RRSP receipts (include contributions to Mar 1 2013)
- Union / Professional Dues
- Spousal Support Paid (details of changes / court order)
- Deductible Child Support Paid
- Safety Deposit Box Charges
- Interest and Carrying Charges on Investments
- Interest Paid on Student Loans
- Investment Counsel and Accounting Fees
- *Employee Expenses (Full details required)
- Deductible Legal Fees (Fees to collect income)
- Declaration of Condition of Employment-**T2200**
- Claim for Board & Lodging Expenses – **TL2**
- Child Care Expenses (Full details/receipts required)
- Moving Expenses **T1M** (Full details required)
- Employment Insurance Repayments
- Allowable Business Investment Loss
- Canadian Forces or Police Deduction
- Losses Carried Forward
- Donations Carried Forward
- Non-deducted RRSP Carried Forward