

## Individual Income Tax Return Checklist

- Prior years' tax returns, if prepared elsewhere**
- Details of foreign investments held personally**
- T4** (Employment Income)
- T4A** (pension, annuity and similar income)
- T4A (OAS)** (old age security pension)
- T4A (P)** (CPP Benefits)
- T4RIF** (receipts from RRIF)
- T4RSP** (receipts from RRSP)
- T4E** (E.I. Benefits)
- T5** (interest or taxable dividends)
- T600** (bonds cashed during a year)
- T5008** (dispositions of securities)
- T101 and T102** (resource expense flow-through shares)
- T3** (statement of income from Mutual Funds and Trusts), including Income Trust units
- T2200** (declaration of conditions of employment signed by the employer)
- T222** Northern Resident Deduction
  - First year of claim – provide proof of residency
  - Claim for travel benefit – provide travel documentation and applicable receipts.
- T5013** (statement of partnership income/loss)
- Investments** (list of all assets purchased, sold, sale price and cost – such as stock, mutual funds, property)
- RRSP contribution receipts**
- Union or professional dues**
- Interest expense** (amount paid and details re any loans taken for business or investment purposes)
- Student tuition receipts** (endorsed by transferors, if applicable)
- Medical receipts**
- Charitable donation receipts**
- Political contribution receipts**
- Tax shelter financial statements**
- Tax installment receipts**
- Prior year's Notice of Assessment from Canada Revenue Agency**
- Child care expense receipts** (Details)
- Employment expense information** (meals, entertainment, home office, equipment not supplied by your employer)
- Self employment information** (revenue and expenses)
- Moving expenses and details**
- RRSP Home Buyers Plan details**
- Details of alimony or maintenance payments**
- Receipts from RRSP Life-time Learning Program Withdrawal**
- Summary of rental properties, receipts and expenses – by property**
- Public transit passes**
- Children's fitness receipts**
- Adoption expenses**
- Trading summary/realized gains (losses report)**
- Home Renovation Tax Credit Details**