

PERSONAL INCOME TAX RETURN CHECKLIST

T4 Slips - Employment income, tips
T4A Slips - Pension, annuity, other income
T4A(OAS) - Old Age Security income
T4A(P) – Canada Pension Plan benefits
T4E - Employment Insurance benefits
T4RIF – Income from RRIF
T4RSP – Income from RRSP
T4RCA – Distributions from retirement compensation arrangement
T5 - Bank interest or taxable dividends
T3 - Statement of trust income
T5007 – Statement of Benefits
T5008 – See capital gains
T5013 - Statement of partnership income
Capital gains/losses – sale proceeds, cost base, commissions

Home Office Expenses (Flat Rate up to \$400)

I worked from home for at least 4 consecutive weeks (>50% of the time) due to COVID-19
of days worked from home _____ (*max. 200*)

-OR-

Home Office Expenses (Detailed)

T2200S – Conditions of Employment (**required prior to filing return**)

I have a summary of home office expenses (rent/prop. taxes, utilities, maintenance, insurance, phone & internet, supplies)

Workspace Area _____ Total Area _____ (*sq. ft.*)

Other Employment Expenses

T2200 - Conditions of employment (**required prior to filing return**)

I will provide a summary of employment expenses including auto expenses (# of business KMs and personal KMs driven during the year), supplies, telecommunications, tradesperson tools, travel and entertainment and home office (see *Home Office Expenses (Detailed)* above)

Rental properties - revenue & expenses

(*if bought or sold in the year please provide statement of adjustments and trust ledger*)

Summary of self-employment - revenues and expenses

Sale of house in 2020 – statement of adjustments, description, year of purchase

First Time Home Buyer in 2020

Homebuyer's Plan RRSP Withdrawal

Moving expenses (will be reviewed by CRA)

Adoption expenses

Union or professional dues

Child care receipts (incl. SIN of caregiver)

Alimony/Support payments (incl. name and SIN of payer/recipient)

Interest, broker expense & carrying charges

RRSP contribution receipts

Rent/Property Taxes paid in Ontario

Lifelong Learning Plan

T2202 Tuition certificate (page 2 signed for transfers from children)

Interest on government student loans

Charitable donation receipts

Tax shelter information

Public transit receipts (Ontario - If 65 or older)

Medical receipts (claims > \$6,000 likely subject to CRA review)

Are you or any family members disabled?

Made renovations for medical reasons?

Are you a volunteer firefighter?

Are you an eligible educator?

Was there a death in the family? (incl. death certificate and will)

Income tax installments

1) Federal:

2) Provincial (QC only):

Prior year's Notice of Assessment or Reassessment

Copies of any Foreign tax filings and associated assessments

Is there anything else that you think we should know when preparing your return, or other comments about delivery, etc.?