



## T1 Personal Tax Return General Checklist

### Receipts and Information Slips

- Information slips (T3, T4, T4A, T5, T4RSP, T4E, T4P, T4A(OAS), T4RIF, T5013, etc.)
- RRSP official slips
- Tuition fee receipts
- Union or professional dues receipts
- Medical receipts
- Donation receipts
- Student loan interest receipts
- Home buyers plan statement
- Amount of tax installments paid
- Notice of assessment/reassessment for prior year
- Last year's income tax return (for new clients only)

### Income Details

- Other pensions not included in information slips
- Other interest and dividends not included in information slips
- Sale of stocks, bonds, mutual funds or real estates
  - No. of units
  - Sales proceeds
  - Adjusted cost bases
  - Commission
  - Investment broker statements (for mutual funds and stocks)
- Amount of spousal or child support received
- Rental income and expenses
- Business, professional and commission income and expenses
- RC62 – Statement of Universal Child Care benefit
- Miscellaneous income

### Deductions and Credits

- Child care expenses – including caregiver's name and SIN (for individuals only)
- Moving expenses (if more than 40km)
- Amount of spousal or child support paid
- Carrying charges and interest expenses including
  - Safety deposit box expenses
  - Interest expenses for investment purposes
- Employment expenses (a signed T2200 form is needed) incl. tradesperson's tools acquired after May 2, 2006
- Disability credit (a signed T2201 form is needed for the 1<sup>st</sup> time application)
- Public transit passes (monthly or longer duration)

- Child tax credit –no of children under the age of 18 at anytime during 2007
- Children's fitness amount (receipts issued by organization providing eligible programs)
- Home Buyer's Amount for first-time buyer (Acquisition date of a qualifying home)
- Home Renovation Expenses (list of eligible expenses incurred after January 27, 2009 and before February 1, 2010, under an agreement entered into after January 27, 2009, for work performed or goods acquired in respect of an eligible dwelling.
- Other deductions

### Home Office Expenses

- Area of home used only for business purposes (sq. ft.)
- Total area of home (sq. ft.)
- Utilities
- Insurance (for self-employed and commission employee only)
- Maintenance and repairs
- Mortgage interest (for self-employed only)
- Property taxes (for self-employed and commission employee only)
- Security monitoring fees
- Others (please specify)

### Automobile Expenses

- Total km driven in the year for business or employment purposes
- Total km driven in the year
- Gas and oil
- Repairs and maintenance
- Lease payments and copy of lease agreement
- Car washes
- Insurance
- Licence and registration
- Interest expenses on money borrowed to purchase automobile
- Parking costs
- Market value of the automobile if it is owned (for new client or new changes only)
- Others (please specify)

### Other Information or Client Notes

---



---



---

*(TIP: Bring your information in **all at once** to make your tax preparation more efficient!)*