



# PagnaniniEdwardsLam

CHARTERED PROFESSIONAL ACCOUNTANTS

## T1 Personal Tax Return General Checklist

### RECEIPTS AND INFORMATION SLIPS

- Information slips (T3, T4, T4A, T5, T4RSP, T4E, T4A(P), T4A(OAS), T4RIF, T5013, etc.)
- RRSP official slips
- Tuition fee receipts (federal education and textbook tax credits have been eliminated for 2017)
- Union or professional dues receipts
- Medical receipts
- Donation receipts
- Student loan interest receipts
- 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
- Details of capital gains and losses realized in 2017
- Details of sale of principal residence
- Amount of spousal or child support received
- Rental income and expenses
- Business or professional activities – income and expenses, including information about Internet business activities **if applicable**
- 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
- Interest expenses for investment purposes
- Employment expenses (a signed T2200 form is needed) incl. tradesperson's tools acquired after May 2, 2006
- Public transit passes (amounts incurred after June 2017 will no longer be eligible for the federal credit)
- Disability credit (a signed T2201 form is needed for the 1<sup>st</sup> time application)

### DEDUCTIONS AND CREDITS continued...

- Home accessibility expenses/BC Home Renovation tax credit for seniors and persons with disabilities
- Children's fitness and art (\$500 max) amounts (receipts issued by organization providing eligible programs) – for BC only (eliminated for federal)
- Home Buyer's Amount for first-time buyer (acquisition date of a qualifying home)
- 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)

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