

# Canadian Personal Income Tax Checklist

## Personal Information

- Full Name
- Permanent Address
- Marital Status at December 31, 2017
- Social Insurance Number
- Purchase or Sale of Principal Residence

## Receipts

- RRSP contribution receipts
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons & apprentice mechanics)
- Medical expenses
- Transit pass receipts (January 1 – June 30, 2017)
- Charitable donations
- Political contributions
- Child care expenses
- Adoption expenses
- Moving expenses
- Interest paid on student loans
- Carrying charges and interest expenses
- Office - in-home expenses
- Exams for professional certification

## Slips

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Tuition / education receipts (T2202A)
- Universal Child Care Benefit (RC62)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- All other information slips

## Other Documentation

- Copy of previous years' tax return
- Notice of Assessment/Reassessment
- Canada Revenue Agency correspondence
- Sale or deemed sale of stocks, bonds or real estate
- Northern resident's deductions receipts
- Rental income and expense receipts
- Business, farm or fishing income/expenses
- Automobile / Travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification
- Search and Rescue volunteers' certification
- Custody Arrangement documentation

## Rental Property

- Address of the rental property
- Total rental income
- Advertising expenses
- Insurance expense
- Mortgage interest
- Office expenses
- Legal, accounting and other professional fees
- Management costs
- Property taxes
- Travel
- Utilities
- Depreciation

## Vehicle Expenses

- Personal vs. business kilometers
- Fuel and oil
- Insurance
- License and registration
- Maintenance and repairs
- Leasing costs
- Depreciation

## Business-use-of-home expenses

- Square footage of office space
- Heating costs
- Electricity costs
- Home insurance
- Maintenance
- Mortgage interest
- Property taxes
- Other home related expenses (i.e. home telephone, internet, etc.)

## Common Write-offs for Sole Proprietors

- Advertising
- Meals & Entertainment (50%)
- Insurance
- Business taxes, licenses, memberships
- Office expenses
- Office stationary and supplies
- Professional fees
- Travel
- Motor vehicle expenses