



Certified General Accountants

Personal Income Tax Return checklist

First name and initial		
Last name		
Mailing address		
City	Province	Postal Code

Your Social Insurance Number	Date of Birth (Y/M/D)
Marital status at December 31	
Spouse/Partner Soc. Ins. Number	Spouse/Partner 1st name
Spouse/Partner net income	

Update Register of Electors?	y () n ()	
Apply for GST/HST credit ?	y () n ()	
Dependant's name	Birthday	Net income
Dependant's name	Birthday	Net income
Dependant's name	Birthday	Net income

Electronically file return?	y () n ()
Own foreign property greater than CDNS100,000 ?	y () n ()
Claim Disability Tax Credit ?	y () n ()
Claim Child Care Expenses ? (If yes include name of org. or SIN of person)	y () n ()
Last year's Notice of Assessment included ?	y () n ()

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|--|---|
| <input type="checkbox"/> T4 | <input type="checkbox"/> RRSP receipts |
| <input type="checkbox"/> T4A | <input type="checkbox"/> Tuition fees paid |
| <input type="checkbox"/> T4A(P) - CPP Benefits | <input type="checkbox"/> Union and professional dues |
| <input type="checkbox"/> T4A (OAS) - Old Age Security benefits | <input type="checkbox"/> Medical expenses |
| <input type="checkbox"/> T4 RSP - RRSP income | <input type="checkbox"/> Charitable donations |
| <input type="checkbox"/> T4 RIF - RRIF income | <input type="checkbox"/> Child care expenses |
| <input type="checkbox"/> T4E - Employment insurance benefits | <input type="checkbox"/> Moving expenses |
| <input type="checkbox"/> T5007 - WCB benefits | <input type="checkbox"/> Safety deposit box rental |
| <input type="checkbox"/> T3 | <input type="checkbox"/> Interest and carrying charges on investments |
| <input type="checkbox"/> T5 | <input type="checkbox"/> Interest on student loan |
| <input type="checkbox"/> T5008 - Statement of security transactions | <input type="checkbox"/> Political contribution receipts |
| <input type="checkbox"/> T5013 - Statement of partnership income | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Capital gains / losses - stock transactions | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Support payments received / paid | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Scholarships / Bursaries | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Self employed earnings information | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Rental income information | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Professional earnings information | <input type="checkbox"/> Notice of Assessment |
| <input type="checkbox"/> Self employed commission earnings information | <input type="checkbox"/> Tax paid by installments receipt |