

# TAXONOMIC ADVISORS

## PERSONAL TAX RETURN CHECKLIST

### INCOME TAX SLIPS

Employers are required to have employment income slips prepared and mailed by February 28 to the address they have on file. If not received by March 8, check with your employer.

For T3 and T5 slips, your financial institution is required to mail them by March 15.

- T4 employment income
- Other income slips:
  - T4E Employment Insurance
  - T4A Pensions and annuities
  - T5007 Provincial assistance and WCB payments
  - T4A(P) Canada Pension Plan
  - T4A(OAS) Old Age Security
  - T4RSP & T4RIF RRSP and RIF income
  - T3 Trust income
  - T5 Investment income
  - T5018 Contract payments
- Other various income slips:
  - T4A-RCA, T4PS, T10, T101, T5008, T5013, RC210, foreign income

### RECEIPTS

Canada Revenue Agency's (CRA) position is to disallow deductions and credits unless the taxpayer can prove they had the expense.

- Tuition slips T2202 (if transferring, ensure page 2 is signed accordingly)
- RRSP contribution slips
- Rent and/or property taxes (MB & ON only)
- Medical receipts (e.g., prescriptions, dental, eyeglasses, etc.)
- Registered charitable donations
- Political donations
- Interest paid on student loans
- Professional and/or union dues
- Carrying and interest expenses for investments
- Spousal support payments/income received (for payment deduction, a copy of court order is required)
- Attendant care expenses (for individuals with disabilities)
- Moving expenses (minimum move of 40 km for employment or education)

### CHILDREN

- Dependant information
- Childcare expenses
- Adoption expenses
- Child support received

### PROFESSIONAL

- Office in home (requires T2200 signed by employer)
- Tradespersons tool expense receipts
- Auto expenses

### OTHER INFORMATION

- Northern Residents Deductions (T2222)
- Clergy Residence Deduction (T1223)
- Capital gains/Adjusted cost base (ACB required for disposed stocks)
- Sold principal residence (information on purchase and sale)
- Rental property (income and expenses)
- Sale of rental property
- Self-employed (income and expenses including GST/HST information)