

## Personal Income Tax Checklist

### Slips

- T4 Slips (Employment Income)
- Employment Insurance Benefits (T4E)
- Interest, dividends, mutual funds (T3, T5)<sup>1</sup>
- Capital Gains (T5008)<sup>2</sup>
- Statement of income from an RRSP (T4RSP)
- Statement of income from a RRIF/LIF (T4RIF)
- Tuition / education receipts (T2202A)
- Old Age Security & CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- All other information slips

### Receipts

- RRSP contribution receipts
- Professional or union dues
- Other employment expenses
- Teacher's school supplies
- Medical expenses
- Home renovations (seniors and disabled)
- Charitable donations
- Child care expenses
- Adoption expenses
- Moving expenses<sup>3</sup>
- Interest paid on student loans
- Carrying charges and interest expenses<sup>4</sup>
- Office – in-home expenses

### Other documentation

- Copy of your most recent tax return
- Notice of Assessment/Reassessment
- Investment Income Summary Report<sup>5</sup>
- Sale of principal residence
- Rental income and expense receipts
- Declaration of Conditions of Employment (T2200)
- Automobile / Travel logbook expenses
- Disability Tax Credit Certificate
- Business, farm or fishing income/expenses
- Volunteer Firefighters certification
- Search and Rescue volunteer certification

1. T3 slips are mailed directly from the Fund Company
2. T5008's are sent by CI Investment Services for Non-Registered Accounts where a Capital Gain or Loss was triggered during the year.
3. If you moved 40+ kms to a new job or work location
4. If you borrowed money to invest in a Non-Registered account, you may be able to deduct your interest expenses on Line 22100 of your return
5. If you have a Fee Based Non-Registered account, you can deduct these fees on Line 22100