

## 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
- Annual Fee Summary<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. The Annual Fee Summary is found at the end of the Supplemental Tax Package from Aligned Capital Partners Inc. If you have a Fee Based Non-Registered account, you can deduct these fees on Line 22100