

## Personal Income Tax Return Checklist

- T4 Slips**—Employment income, tips
- T4A Slips**—Pension, annuity, other income
- T4A(OAS)**—Old age security income
- T4A(P)**—CPP benefits
- T4U**—Employment Insurance benefits
- T4RIF**—Proceeds from RRIF
- T4RSP**—Proceeds from RRSP
- T5**—Bank interest or taxable dividends
- T3**—Statement of trust income
- T600**—Bond interest coupons
- T5008**—Investment income
- T5013**—Statement of partnership income
- T2200**—Declaration of conditions of employment
- List of employment expenses including: home office, entertainment, tradepersons’ tools, auto (with amount of business and personal kilometers driven in year)\*
- Rental properties—revenue & expenses\*
- Capital gains—sale proceeds, commission, cost, dates of purchase and sale (obtain from broker if missing)
- First time home buyer, first time owning in 5 years, or home purchased to accommodate disability
- RRSP contribution receipts
- Union or professional dues
- Interest expense & other carrying charges
- Student tuition receipts
- Medical receipts
- Charitable donations receipts
- Tax installment receipts totalling \$\_\_\_\_\_
- Child care receipts
- Child fitness receipts
- Self-employment revenue and expenses including amounts for qualified Red Seal apprentices
- Prior year’s Notice of Assessment or Reassessment
- Alimony and child support
- Tax shelter information
- Home Buyers Plan Repayment of \$\_\_\_\_\_
- Interest on student loans
- Disability information for you or a family member
- Public transit passes totalling \$\_\_\_\_\_
- Home renovation receipts for labour, materials or goods acquired between January 28, 2009 and January 31, 2010

\*Blank schedules for Employment Expenses and Rental, Business and Professional Revenue and Expenses are available on our website, [www.mclartyco.ca](http://www.mclartyco.ca), on the Tax Planning and Compliance page under Our Services.

**Notes to Preparer:**

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