



# T1 PERSONAL TAX RETURN CHECKLIST

## GENERAL INFORMATION

- Changes to any dependent information in your family (e.g. new children)
- New address information
- Change to marital status
- Amount of tax installments paid
- Notice of assessment/reassessment for prior year
- Last year's income tax return (new clients only)
- Rent and/or property tax paid

## RECEIPTS AND INFORMATION SLIPS

- Information slips (T3, T4, T4A, T5, T4RSP, T4E, T4P, T4A(OAS), T4RIF, T5013, RC62, etc.)
- RRSP contribution slips
- RRSP home buyers plan / lifelong learning plan statements
- Tuition fee slips (T2202)
- Union or professional dues receipts
- Official charitable/political donation receipts
- Medical expense receipts for yourself and your dependents
- Public transit passes
- Student loan interest receipts
- Statement of interest paid for business or investment loans

## OTHER INCOME AND DEDUCTIONS

- Amount of spousal support paid or received
- Other pensions not included in information slips
- Sale of stocks, bonds, mutual funds, real estate or digital currency (i.e. Bitcoin)
  - Number of units
  - Sales proceeds
  - Adjusted cost bases
  - Commission
  - Investment broker statements
- Child care expenses - including caregivers name and SIN (for individuals only)
- Moving expenses
- Investment counsel/management fees
- Home buyer's amount for first-time home buyer (acquisition date of qualifying home)
- Disability tax credit (approved T2201 required)

*(TIP: Bring your information in **all at once** to make your tax return preparation more efficient)*

## EMPLOYMENT EXPENSES

- T2200 (Statement of Conditions of Employment) signed by employer
- Listing of employment expenses (*Go to [rlb.ca](http://rlb.ca) for Personal Tax Employment Expenses Templates*)
- Number of kilometers driven for employment purposes and total kilometers driven for the year (if applicable)
- Area of home used for employment purposes and total area of home (sq. ft.) (if applicable)

## SELF-EMPLOYMENT INCOME AND EXPENSES

- Detailed listing of self-employment income and expenses for the year (*Go to [rlb.ca](http://rlb.ca) for Personal Tax Employment Expenses Templates under "RESOURCES" select "Small Business Templates"*)
- Details on all fixed asset additions and/or disposals
- Number of kilometers driven for business purposes and total kilometers driven for the year
- Area of home used for business purposes and total area of home (sq. ft.)

## RENTAL INCOME AND EXPENSES

- Detailed listing of rental income and expenses for the year per property (*Go to [rlb.ca](http://rlb.ca) for Personal Tax Employment Expenses Templates under "RESOURCES" select "Small Business Templates"*)
- Details on all property repairs/maintenance and fixed asset additions for the year

**Do you own foreign property/investments with a total cost of more than \$100,000? If so, please provide the following:**

- Investment statements at December 31 for each Canadian brokerage account that holds foreign investments
- Details of any Canadian brokerage accounts that were closed during the year that held foreign investments
- Name of foreign institution/investment, country where property is held, adjusted cost base, highest cost base during the year, gross income and capital gains generated from property
- Listing of any income generating foreign real estate property owned

## OTHER INFORMATION OR NOTES

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