

T1 PERSONAL TAX RETURN CHECKLIST

GENERAL INFORMATION

- ☐ Changes to any dependent information in your family (e.g. new children)
- ☐ New address information– did you sell primary residence in the year? If so, provide the amount sold for and year purchased
- ☐ 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, T4RIF)
- ☐ 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 family
- ☐ Student loan interest receipts
- ☐ Statement of interest paid for business/investment loans

OTHER INCOME AND DEDUCTIONS

- ☐ Amount of spousal and child 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)
- ☐ Childcare expenses - including caregivers name and SIN (for home centers 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)
- ☐ Staycation Tax credit – Submit accommodation receipts

EMPLOYMENT EXPENSES

- ☐ Did you work from home in 2022?
- ☐ T2200 (Statement of Conditions of Employment) signed by employer, or we can use the simplified method.
- ☐ Listing of employment expenses (Go to rlb.ca/services/templates-checklists 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/services/templates-checklists for Personal Tax Employment Expenses 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/services/templates-checklists for Personal Tax Employment Expenses 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

You can send your information into us electronically. [Call us](tel:519-875-2222) to find out how.

Other information or notes: