

Personal Income Tax Return Checklist

Name:	
Income items	
T4 Statement of Employment Income	
T4A Statement of pension, retirement, annuity, old age security, or other income	
T4RSP Statement of Income from a registered retirement savings plan	
R4RIF Statement of Income from a registered retirement income fund	
T4E Statement of Employment Insurance Benefits	
T-5 Statement of Investment Income	
T2200 Statement of Allowable Expenses signed by your employer	
T-5007 Statement of Benefits from WS&IB or Social Assistance	
T5008 Statement of Securities Transactions	
T5013 Statement of Partnership Income	
T3 Supplementary (Capital Gains etc.)	
Capital Gains or Losses statements from the Investment Advisors	
Other T slips	
Official receipts for:	
RRSPs	
Tuition fees	
Union & professional dues	
Prescription drugs, medical expenses - Talled and Totalled	
Charitable donations - Talled and Totalled	
Other expenses and Receipts	
All child care expenses or attendant care expenses for a disabled person	
Moving expenses if you moved 40+km. to a new job or work location	
Property taxes Paid	
Rent paid + name of landlord	
Interest paid on loans for investments	
Commissioned sales person expenses (similar to business expenses) *	
Any legal expenses to collect alimony, pension or retiring allowances	
Schedule of purchase & sale of securities, commissions paid	
Notes:	