



Personal Income Tax Checklist

It is important to provide current and relevant information in order to complete your taxes.

Please let us know if there have been any changes to your:

- ☐ Phone number, email or address – did you move?
- ☐ Marital status – did you get married or separated?
- ☐ Family – additional dependants?

Please let us know if:

- ☐ You sold or bought a home- if so, please provide sale documents
- ☐ You received gratuity (tips)
- ☐ You or a member of your family are a foreign/dual citizen o Any foreign property/investments/assets over \$100,000?
- ☐ You traded Cryptocurrency/ NFTs (Non-Fungible Tokens) Please

provide the following information:

Income

- ☐ T4, T4A, T4E, T4OAS and/or T4AP
- ☐ Social assistance (T5007) and/or WCB
- ☐ RRSP, T4RSP, T4PS and/or T4RIF
- ☐ Investments – T3 and/or T5
- ☐ Capital gains – T5008

Expenses

- ☐ Medical receipts
- ☐ Medical travel – appointment confirmation will be needed
- ☐ Child care
- ☐ Tuition - was your tuition reimbursed?
- ☐ Student loan interest
- ☐ Charitable and/or political donations
- ☐ Employment expenses – Form T2200 and any necessary receipts
- ☐ Home office
- ☐ Investment fees from non-registered accounts/ Carrying charges
- ☐ Northern Resident expenses

Other Income/Expenses

- ☐ Self-employment income and expenses
- ☐ Rental income and expenses
- ☐ Vehicle expenses
- ☐ Child and/or spousal support
- ☐ First Home Savings Account (FHSA)

If there are other documents you think should be included on your taxes, please bring them in as well!