

## Personal Tax Return — Document Checklist

Please gather all applicable documents below before dropping off your tax records | Tax Year:

### Personal Information

- SIN for you, spouse/partner & dependants
- Date of birth for new dependants
- Current mailing address & contact info
- Prior year Notice of Assessment
- Marital status changes during the year
- Spouse/partner's net income

### Self-Employment / Business Income

- Revenue & expense records / bookkeeping summary
- Business-use-of-home expense details
- Vehicle logbook & expense records
- GST/HST number & filing details (if registered)
- T2125 worksheet or professional/commission records

### Tax Credits

- Medical expense receipts (all family members)
- Charitable donation receipts
- Political contribution receipts
- T2201 – Disability Tax Credit Certificate
- Home accessibility renovation receipts
- First-time home buyer closing documents
- HBP or LLP repayment details

### Employment & Pension Income

- T4 – Employment income
- T4A – Pension, retiring allowance, other income
- T4A(P) – CPP benefits
- T4A(OAS) – Old Age Security benefits
- T4E – Employment Insurance (EI) benefits
- T4RIF – RRIF withdrawals
- T4RSP – RRSP withdrawals / maturity

### Rental Income

- Total rental income received per property
- Mortgage interest statements
- Property tax receipts
- Insurance, repairs & maintenance receipts
- Utilities, advertising & management fees
- CCA details for rental property

### Employment Expenses & Home Office

- T2200 – Declaration of Conditions of Employment (signed by employer)
- Home office expense records
- T777 – Employment expenses form
- Tools, supplies, or uniform expenses

### Investment & Other Income

- T3 – Trust / mutual fund income
- T5 – Interest & dividend income
- T5008 – Securities transactions (stocks, bonds)
- T5013 – Partnership income
- Capital gains/loss records (dates, amounts)
- Foreign income statements or tax slips

### Deductions & Contributions

- RRSP contribution receipts (incl. first 60 days)
- FHSA contribution receipts / T4FHSA slip
- Union or professional dues receipts
- Childcare expense receipts & provider SIN
- Moving expense receipts (work/school move)
- Support payments made or received (court order)
- Student loan interest paid
- T2202 – Tuition (for you or transferring dependant)

### Family & Benefits

- Canada Child Benefit (CCB) – children in care
- Dependant care / infirm dependant info
- Installment payment receipts / reminders
- Northern residents deduction records

### CRA Correspondence

- Any CRA letters or reassessment notices
- Outstanding balance or payment records
- CRA My Account login (if available)

***If you are unsure whether a document applies to your situation, please bring it along — it is always better to have too much than too little. Our team is happy to answer questions prior to your drop-off.***