

# Personal Income Tax Checklist

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To assist in the preparation of your Personal Income Tax Return, please complete this form and attach the supporting documentation.

In the event of an audit, the onus of proof is on the taxpayer; unsupported claims may be denied.

For information on Audits, refer to [Understanding Tax: Audits](#).

For information on Personal Tax, refer to [Understanding Tax: Personal Tax](#).

Name \_\_\_\_\_

## NEW CLIENT OR NEW INFORMATION

New Client  
or New  
Information  
New Clients

<input type="checkbox"/>	Street	Phone
<input type="checkbox"/>	City Postal	Cell
<input type="checkbox"/>	Email	Birthday (m/d/y) / /
<input type="checkbox"/>	Tax return - last year filed	<input type="checkbox"/> Notice of Assessment

Marital  
Status

<input type="checkbox"/>	Married or Common-Law	<input type="checkbox"/>	Spouse
<input type="checkbox"/>	Single or Widowed	<input type="checkbox"/>	Birthday (m/d/y) / /
<input type="checkbox"/>	Separated or Divorced	<input type="checkbox"/>	SIN: - -
<input type="checkbox"/>	Date of status change / /	<input type="checkbox"/>	Net income

Dependents

Name	Birthday (m/d/y)	SIN	Gender	Net Income
<input type="checkbox"/>		- -	M F	\$
<input type="checkbox"/>		- -	M F	\$
<input type="checkbox"/>		- -	M F	\$

## PLEASE ANSWER ALL QUESTIONS

Other

<input type="checkbox"/>	Please provide any changes to your address or contact information	Y	N
<input type="checkbox"/>	Do you have an online CRA account?	Y	N
<input type="checkbox"/>	Are you signed up for CRA email notifications?	Y	N
<input type="checkbox"/>	Are you a Canadian citizen?	Y	N
<input type="checkbox"/>	Release personal information to Elections Canada?	Y	N
<input type="checkbox"/>	Release name, email address and postal code to BC Transplant?	Y	N
<input type="checkbox"/>	Did you dispose of a property for which you are claiming a principal resident exemption?	Y	N
<input type="checkbox"/>	Did you dispose of a housing unit rental property or right to purchase a property?	Y	N
<input type="checkbox"/>	Did you own specified foreign property at any time with a total cost of more than CAN \$100,000?	Y	N
<input type="checkbox"/>	Did you own an interest in a foreign affiliate at any time in 2024?	Y	N

Documents

<input type="checkbox"/>	Notice of Assessment	<input type="checkbox"/>	Summary of instalment payments and receipts
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Sale of  
Principal  
Residence

<input type="checkbox"/>	Year at purchase
<input type="checkbox"/>	Proceeds of Disposition (sales price) \$
<input type="checkbox"/>	Percentage of ownership %
<input type="checkbox"/>	Was the property your principal residence for all the years it was owned? Y N

# Personal Income Tax Checklist \_ continued

## Income

### Personal

- ☐ T4 – Employment Income
- ☐ Other Employment Income (Tips, benefits)
- ☐ T4A (OAS) – Old Age Security
- ☐ T4A (P) – CPP Benefits
- ☐ T4A – Pension and other income
- ☐ T4E – Employment Insurance benefits
- ☐ T5007 – Social Assistance/WCB
- ☐ T4 RSP – RRSP Income
- ☐ T4 RIF – RRIF Income
- ☐ Self-Employed Income (use checklist)
- ☐ Alimony Received \$

### Investment

- ☐ T3 – Estate/Trust/Mutual Funds Income
- ☐ T5/T3 – Interest and Dividend Income
- ☐ T600 – Canada Savings Bonds
- ☐ T5008 – Statement of Security Transactions
- ☐ T5013 – Limited Partnership Income
- ☐ Capital Gains/Losses
- ☐ Rental Income (use checklist)
- ☐ Foreign Income

## Deductions

- ☐ RRSP Contribution Receipts
- ☐ Union, Professional Dues
- ☐ Alimony Paid \$
- ☐ Deductible Child Support Paid \$
- ☐ Interest and Carrying Charges on Investments

- ☐ Deductible Legal Fees
- ☐ Child Care Expenses
- ☐ Moving Expenses
- ☐ Investment Counsel and Accounting fees
- ☐ Employment Expenses (use checklist)

## Tax Credits

- ☐ T2201 – Disability Deduction
- ☐ T2202 – Tuition Fees/Education Credit  
(For transfer from dependant, complete reverse of slip.)
- ☐ Interest Paid on Student Loans

- ☐ Medical Receipts
- ☐ Attendant and Care Home Expenses
- ☐ Charitable Donations
- ☐ Political Contribution Receipts

## Keeping Records

Generally you must keep your records for six years from the end of the taxation year to which they relate. For more information about keeping records, refer to [Understanding Tax: Record Retention](#).

## Notes and Questions

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