

Personal Tax Preparation Checklist

#	Description <small>(double click topics to expand / collapse)</small>	Initial information required	Applicable? <small>(double click to change)</small>
1	GENERAL		<input type="checkbox"/>
1.1	New Clients		
1.1.1	Personal Information	Name, Address, SIN, Date of Birth, Marital Status	<input type="checkbox"/>
1.1.2	Spousal Information	Name, Address, SIN, Date of Birth	<input type="checkbox"/>
1.1.3	Children	Name, Address, SIN(if applicable), Date of Birth	<input type="checkbox"/>
1.1.4	Prior year's taxes	Copies of prior year's tax return(s) and notices of assessment	<input type="checkbox"/>
1.1.5	Disability tax credit	Are you or any of your dependants disabled?	<input type="checkbox"/>
1.2	Returning Clients		
1.2.1	Prior year's taxes	Copies of prior year's notices of assessment	<input type="checkbox"/>
1.2.2	Change of address	Did you move during the year?	<input type="checkbox"/>
1.2.3	Change in marital status	Did your marital status change during the year?	<input type="checkbox"/>
1.2.4	Dependants	Did you have any children during the year?	<input type="checkbox"/>
1.2.5	Other items	Has anything significant happened in the past year that is not covered here?	<input type="checkbox"/>
2	INCOME		<input type="checkbox"/>
2.1	Salary/commissions	T4/T4A/T4PS slips	<input type="checkbox"/>
2.2	Interest, Dividends, Etc.	T3/T5 slips	<input type="checkbox"/>
2.3	Old Age Security	T4A(OAS) slip	<input type="checkbox"/>
2.4	CPP Benefits	T4A(P) slip	<input type="checkbox"/>
2.5	Pension Income	T4A slips	<input type="checkbox"/>
2.6	EI, Maternity Leave payments	T4E slip	<input type="checkbox"/>
2.7	Partnership Income	T5013 slips	<input type="checkbox"/>
2.8	Registered Disability Savings Plan Income	T4A slips	<input type="checkbox"/>
2.9	RRSP Income	T4RSP slips	<input type="checkbox"/>
2.10	Workers' Compensation	T5007	<input type="checkbox"/>
2.11	RESPs, scholarships, bursaries	T4A	<input type="checkbox"/>
2.12	Capital gains/losses	Initial Cost and Proceeds of Sale of any dispositions during the year (stocks, bonds, personal property, etc.)	<input type="checkbox"/>
2.13	Other	Any other slips received	<input type="checkbox"/>
3	DEDUCTIONS		<input type="checkbox"/>
3.1	RRSP Contributions	RRSP Contribution receipt(s)	<input type="checkbox"/>
3.2	Union/Professional Dues	Receipts from the union/organization	<input type="checkbox"/>
3.3	Moving Expenses	Did you change jobs during the year, and move at least 40km closer to work?	<input type="checkbox"/>
3.4	Carrying Charges	Interest/Fees paid to earn investment income (ex. Investment counsel fees, safety deposit box charges, interest)	<input type="checkbox"/>
4	CREDITS		<input type="checkbox"/>
4.1	Public Transit Amount	Bus passes/receipts if you take transit to work/school	<input type="checkbox"/>
4.2	Tuition	T2202 slips	<input type="checkbox"/>
4.3	Tuition transfer	T2202 slips of a spouse, child, or grandchild	<input type="checkbox"/>
4.4	Interest on Student Loans	Tax receipt from OSAP, etc.	<input type="checkbox"/>
4.5	Medical Expenses	Medical receipts for those expenses not reimbursed	<input type="checkbox"/>
4.6	Donations	Donation receipts	<input type="checkbox"/>
4.7	Ontario Tax Credits - Healthy Homes	Amounts paid to improve accessibility to your home	<input type="checkbox"/>
4.8	Ontario Tax Credits - Rent & Property tax	Rent receipts/Property taxes paid	<input type="checkbox"/>
5	CHILDREN		<input type="checkbox"/>
5.1	Universal Child Care Benefit	RC62 slip	<input type="checkbox"/>
5.2	Child Care	Receipts from those who provided child care	<input type="checkbox"/>
5.3	Fitness/Arts	Receipts for arts/fitness programs	<input type="checkbox"/>
6	STUDENTS	Some items here are duplicated - items specific to students	<input type="checkbox"/>
6.1	Tuition	T2202 Slip	<input type="checkbox"/>
6.2	Ontario tax credits	Rent paid, and/or whether or not you lived in a student residence	<input type="checkbox"/>
6.3	Employment Income	T4 slips	<input type="checkbox"/>
6.4	Interest/Dividends	T5 slips	<input type="checkbox"/>
6.5	Scholarships/Bursaries/RESP	T4A slips	<input type="checkbox"/>
6.6	Public Transit Amount	Receipts for bus passes used for school	<input type="checkbox"/>

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6.7	Moving Expenses - to school	If you moved for school and have taxable scholarships/bursaries	<input type="checkbox"/>
6.8	Moving Expenses - back home	If you moved back home to work (co-op, etc.)	<input type="checkbox"/>
7	EMPLOYMENT EXPENSES		<input type="checkbox"/>
7.1	Eligibility to claim	Employer-filled out T2200	<input type="checkbox"/>
7.2	Expenses	Summary of expenses - Supplies, auto, home office, etc.	<input type="checkbox"/>
8	SELF-EMPLOYED		<input type="checkbox"/>
8.1	General Information	Name, address, start date of business (if new)	<input type="checkbox"/>
8.2	Income & Expenses	Prepared income statement	<input type="checkbox"/>
8.3	Motor Vehicle	Summary of related receipts	<input type="checkbox"/>
8.4	Home Office	Summary of related receipts	<input type="checkbox"/>
9	RENTAL PROPERTY		<input type="checkbox"/>
9.1	Purchase of a property during the year	Purchase date, address, cost and type of property	<input type="checkbox"/>
9.2	Income & Expenses	Rental income & related expenses	<input type="checkbox"/>
10	SUPPORT PAYMENTS		<input type="checkbox"/>
10.1	Recipient/Payer	Name, SIN of recipient/payer of support	<input type="checkbox"/>
10.2	Amounts paid/received	Details of amounts - breakdown between spousal & child support	<input type="checkbox"/>
10.3	Legal fees	Recipient only - legal fees incurred to obtain spousal support	<input type="checkbox"/>