

PERSONAL TAX RETURN DOCUMENTS CHECKLIST

PERSONAL INFORMATION

- SIN:
- Name:
- Date of Birth:
- Address:

DEPENDENTS: CHILDREN

(LIVING WITH YOU)

- Name:
- Relation:
- Date of Birth:
- SIN:

DEDUCTIONS

- RRSP
- Child Day Care / Baby Sitting Expenses
- Children Fitness & Art Expenses
- Children School Lunch Fees
- Parents Caregiver Amount (over 65)
- Donation Receipts
- Medical Insurance & Expenses
- Medical Insurance with Employer
(Bring Last Pay Stub)
- First Time Home Buyer Amount
- Safety Deposit Box
- Bus Passes
- T2202A - Tuition Fee Receipt
- Student Loan Interest
- Investment Loan Interest
- T2201 - Disability Tax Credit
- Family Caregiver Amount
- T1M - Moving Expenses
- T2200 - Employment Expenses (T777)
- TL2 - Long Haul Truck Driver's Meal Expenses
- Tools for Handyman
- T2222 - Northern Residents Deduction
- Volunteer Firefighters' Amount
- Adoption Expenses
- CRA Direct Deposit Information

E. & O.E.

SPOUSAL INFORMATION

- SIN:
- Name:
- Date of Birth:
- Address:

DEPENDENTS: PARENTS/GRANDPARENTS

(LIVING WITH YOU)

- Name:
- Relation:
- Date of Birth:
- SIN:

INCOME DOCUMENTS

- T4
- T4A
- T4E
- T4RSP
- T4A(P)
- T4A (OAS)
- T4RIF
- T5007
- T5008
- T3
- T5
- T5013
- RC62 - Universal Child Tax Benefit
- Rental Income & Expenses (T776)
- Capital Gain/Loss From Shares/Real Property
- Self Employed Income & Expenses (T2125)



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