

2018 Personal Income Tax Checklist

Slips

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008, T5013)
- Tuition / education receipts (T2202A)
- Universal Child Care Benefit (RC62)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- All other information slips (T4RSP, T4RRIF)
- Foreign Income
- US Income Slips (1099-INT & DIV, SSA-1099, PEN-1099-R)
- US Foreign Bank Account & Reporting (FBAR)
- Closer Connection Exception (IRS-8840)

Receipts (Please Summarize)

- RRSP contribution receipts
- Support for a child, spouse or common-law partner
- Professional or union dues
- Medical expenses
- Tuition for Self or Dependent Children
- Senior transit pass receipts for 2018 (Over 65) Maximum \$3000
- Charitable donations
- Political contributions
- Child care expenses
- Adoption expenses
- Moving expenses
- Interest paid on student loans
- Employment expenses
- Office - in-home expenses
- Exams for professional certification
- Eligible educator school supplies

Investments

- Broker statements, statements of capital gains and losses
- Investment counsel fees
- Interest on money borrowed to purchase investments
- Sale of other investments (i.e. real estate)
- T1135 Foreign Reporting Documentation

Other documentation

- Canada Revenue Agency correspondence
- Rental income and expense summary
- Business income and expense summary
- Automobile / Travel logbook and expenses
- Disability Tax Credit Certificate (T2201)
- Caregiver amount supporting a relative or child with disability
- Declaration of Conditions of Employment (T2200)
- Custody Arrangement documentation
- Property taxes and rent paid
- Details on sale of principal residence
- Amount for eligible dependant
- Home accessibility
- First time home buyer