



Kyle Moore, CPA  
[Kyle@Bridgecpa.ca](mailto:Kyle@Bridgecpa.ca)

Don O'Brien, CPA, CGA  
[Don@Bridgecpa.ca](mailto:Don@Bridgecpa.ca)

[www.Bridgecpa.ca](http://www.Bridgecpa.ca)  
Ph: 403.320.7772

## Canadian Personal Income Tax Return Checklist

Name: \_\_\_\_\_ Phone#: \_\_\_\_\_ Email: \_\_\_\_\_

### T-Slips & Receipts

(Official receipts required)

### All T-slips Required

- |  |                                 |
|--|---------------------------------|
| <input type="checkbox"/> T3                                  | <input type="checkbox"/> T4RSP  |
| <input type="checkbox"/> T4                                  | <input type="checkbox"/> T4FHSA |
| <input type="checkbox"/> T5                                  | <input type="checkbox"/> T10    |
| <input type="checkbox"/> T4A                                 | <input type="checkbox"/> T101   |
| <input type="checkbox"/> T4A(OAS)                            | <input type="checkbox"/> T1163  |
| <input type="checkbox"/> T4A(P)                              | <input type="checkbox"/> T1164  |
| <input type="checkbox"/> T4E                                 | <input type="checkbox"/> T5007  |
| <input type="checkbox"/> T4PS                                | <input type="checkbox"/> T5008  |
| <input type="checkbox"/> T4RIF                               | <input type="checkbox"/> T5013  |
| <input type="checkbox"/> US OR OTHER<br>FOREIGN TAX<br>SLIPS | <input type="checkbox"/> T5018  |
- 
- ☐ Official RRSP contribution receipts
  - ☐ RRSP withdrawal slips (T4RSP)
  - ☐ Profession/union dues receipts
  - ☐ Charitable donation receipts
  - ☐ Political contribution receipts
  - ☐ Child care receipts
  - ☐ Medical receipts including medical Travel
  - ☐ Summary of tax installments paid
  - ☐ Scholarships, bursaries' etc.
  - ☐ Capital gains & losses **realized with cost information**

### All Income (Worldwide)

- ☐ Self-employed/partnership business income and expenses (sort receipts into categories)
- ☐ Rental income and expenses (*ask for our "Rental Income Schedule"*)
- ☐ Employment income not on T-slips, including tips, gratuities, casual labor, etc.
- ☐ All other income – honorariums, management fees, foreign pensions, etc.
- ☐ Director fees
- ☐ Pensions not reported on T-slips (certain pensions can be split with spouse)
- ☐ Investment statements
- ☐ Sale of personal property, stocks, bonds, land (*rental property or principle residence*), etc. including purchase and sale prices
- ☐ Spousal support received
- ☐ Details of foreign property owned at any time in the year

### Student Related Documents

- ☐ Tuition receipts T2202 (USA TL11) sign pg. 2 to transfer to parents.
- ☐ Student Loan Interest Statements
- ☐ RESP withdrawal slips

### Other Deductions/Tax Credits

- ☐ Teacher and Early Childhood Educator School Supply Tax Credit max \$1,000 in eligible teaching supplies
- ☐ First Time Home Buyers Tax Credit (HBTC)
- ☐ Moving expenses including cost of maintaining vacant residence (*ask for our moving expense form*)
- ☐ Employment related expenses with sign "T2200 Declaration of Conditions of Employment from your Employer"
- ☐ Long Haul Truck Drivers (*A signed T2200 & TL2 form to claim meals & entertainment*)
- ☐ Employment related expenses with sign "T2200S Declaration of Conditions of Employment Due to Covid"
- ☐ Spousal support paid
- ☐ Disability Tax Credit (*Certificate T2201*)
- ☐ Disability Support Deductions. (*Eligible Expenses to work or go to school*)
- ☐ Interest on money borrowed to purchase investments
- ☐ Home Buyers Plan withdrawals and repayments during the calendar year
- ☐ Caregiver Tax Credit
- ☐ Tradesperson's tools acquire by an employee
- ☐ Tools acquire by apprentice vehicle mechanics
- ☐ Safety deposit box fees and accounting fees
- ☐ Adoption related expenses
- ☐ Firefighter volunteer letter
- ☐ Home accessibility renovation costs for eligible expenses for those with Disabilities
- ☐ Work related training expenses
- ☐ Clergy Residence Deduction

### Tips To Help Minimize Your Professional Fees

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Bring everything in <u>one</u> package and <b>KEEP STAPLES AT A MINIMUM</b> | <input type="checkbox"/> Come in early <b>AFTER YOU RECEIVED ALL YOUR SLIPS</b> | <input type="checkbox"/> <b>Ask for a summary print out from each of your Medical Practitioners</b> ( <i>Prescriptions, Dental, Chiropractor, etc.</i> ) |
|--|---|--|
- 
- ☐ Do not separate T-slips