

DJH & PARTNERS LLP
PERSONAL TAX CHECKLIST

Receipts and Information Slips

- Information slips
(T3, T5, T4RSP, T4E, T4P, T4A(OAS), T4RIF, T5013, etc.)
- RRSP official slips
- Union or professional dues receipts
- Medical receipts (including health insurance premium and travel medical insurance premium paid)
- Donation receipts
- Amount of tax installments paid
- Notice of assessment/reassessment for prior year

Investment Income Details (if any)

- Sale of stocks, bonds, mutual funds or real estates
- Sales proceeds
- Adjusted cost bases
- Commission
- Investment broker statements (mutual funds and stocks)
- Amount of spousal or child support received
- Rental income and expenses
- Business, professional and commission income and expenses
- RC62 – Statement of Universal Child Care benefit
- Other income
- Foreign employment income

Other Deductions and Credits

- Child care expenses – including caregiver's name and SIN (for individuals only)
- Carrying charges and interest expenses including
- Interest expenses for investment purposes
- Public transit passes (monthly or longer duration)
- Rental or property tax paid
- Duration of rental

Personal information (you, your spouse and your kids)

- Legal name
- Date of Birth
- SIN
- Address
- Phone number
- Are you a Canadian citizen?
- Did you sell a real estate property this year?
- Any change of marital status and if so, the date of change?
- Date of immigration/ emigration
- Any major life events this year?



DJH