



**CANADIAN TAX FILING CHECKLIST**

**Tax Year :** \_\_\_\_\_

**Name** \_\_\_\_\_

**Spouse Name** \_\_\_\_\_

**Business Name** \_\_\_\_\_

**Business Number** \_\_\_\_\_

**BUSINESS INCOME DOCUMENTS**

- Business Bank & Credit Card Statements
- Revenue Invoices / Settlement / Commission St.
- Expense Bills (See list on right)
- Automobile Business Use Log
- CRA Letters and Statements
- Business Registration (New Clients only)
- Website Address, if any.

**PERSONAL INCOME**

- Employment Income T4
- Commission Income T4A
- Investment Income T5
- Income from Trust T3
- Employment Insurance Benefits T4E
- Worker Compensation/Social Assistance T5007
- Pension Income T4A, T4A(P), T4RIF, T4RSP
- Old Age Security T4OAS
- Partnership Income T5013
- Spouse Support Payments Received

**DEDUCTIONS & CREDITS**

- RRSP Contributions
- Medical, Dental, Prescription Drugs
- Private Health Insurance Plan contributions
- Charitable Donation Receipts
- Tuitions Fees Detail T2202A.
- Interest paid on Student Loan
- Professional & Union Dues
- Public Transit / Presto Statement
- Mortgage Statement
- Child Care Receipts.
- Canada Caregiver Credit
- House Property Tax/Rent Receipts
- Property more than \$100,000 outside Canada
- First Time Home Buyer
- Legal fees to establish spouse support.
- Moving expenses
- Political Contribution Receipts.
- Disability Tax Credit claim Form T2201
- Spouse Support Payments Paid.
- Adoption Expenses.

**REAL ESTATE RENTAL INCOME**

- Complete Rental Income Worksheet

**SALE OF REAL ESTATE**

- Complete Sale of Real Estate Worksheet
- Sale of Principle Residence

**SALE OF INVESTMENTS**

- Complete Sale of Investments Worksheet

**EMPLOYMENT EXPENSES**

- Complete Employment Expenses Worksheet
- Form 2200 from Employer

**BUSINESS EXPENSES**

- Advertisement
- Automobile
- Bank Charges
- Business Tax, Toll, Licenses & Memberships
- Computer-related Expenses
- Delivery & Freight
- Depreciation / Capital Cost Allowance
- Fuel Expenses
- Home Office Expenses
- Insurance
- Lease / Equipment Rental
- Interest on Loan/ Line of Credit
- Major Capital Purchases (To Claim Dep/CCA)
- Meal & Entertainment
- Office Expenses
- Office Stationery & Supplies
- Professional Fees
- Property Tax
- Purchases: Goods for Resale or Production
- Rental : Real Estate
- Repair & Maintenance
- Salaries, Wages & Benefits
- Sub-contracts
- Telephone & Internet
- Travel
- Utilities

Please note the list is not exhaustive. Based on your situation, additional papers and information could be requested.