

Holt & Co.
ASSURANCE – TAX – ADVISORY

Personal Income Tax Document Checklist

[General Items](#)

- Your current contact info
- Copy of any foreign tax return filed (U.S. citizens must file U.S. returns)
- Your personal marital status as at December 31st including (as applicable) dates of: marriage, separation, divorce, widowhood
- Names and SIN's of spouse & dependents (including dates of birth)
- Note consenting to provide your income tax information to Elections Canada
- Details of foreign property holdings (if any*) (T1135**)
- Contact details & consent to discuss your investments with any advisors
- Details of lawsuits settled in the year
- Support & settlement details resulting from matrimonial changes, if any
- TFSA statements
- Direct deposit information for CRA (if desired) or updates to bank account information

[Income Details](#)

- Employment income (T4)
- Miscellaneous Income (T4A)
- Income from employment insurance (T4E)
- Profit Sharing (T4PS)
- Pension income (T4A, T4A(P), T4RIF, T4RSP)
- Old age security (T4OAS)
- Income from trusts (such as mutual fund investments) (T3)
- Investment income (T5)
- Workers compensation/social assistance payments (T5007)
- Details of the sale of securities such as stocks & bonds (e.g. realized gain/loss report from your broker), (T5008)
- Income from partnerships (T5013)
- Details of real estate sales & purchases
- U.S. social security & any other foreign pensions
- Income from foreign investments
- Spousal support payments received – pursuant to court ordered documents

Deductions – General

- RRSP contributions
- Medical receipts (example: dental, prescription drugs, nursing home expenses)
- Payments made during the year to a private health insurance plan
- Charitable donation receipts
- Tuition fees (T2202A for Canadian & TL11 for foreign universities) for yourself; or if transferring from a dependent the form must be signed by the student
- Interest paid on student loans
- Professional dues & insurance, union dues
- Interest on loans assumed to purchase investments
- Professional consultant fees
- Legal fees paid to establish child or spousal support or to enforce a pre-existing agreement
- Legal fees paid to recover wages from your employer
- Details of people you support & their medical status
- Child care receipts (if for camp, list dates attended)
- Non-reimbursed moving expenses if you moved 40 km or closer to a new work space location
- Property taxes or residential rent paid & to whom
- Political contributions receipts
- Disability tax credit claim form completed by authorized health practitioner (T2201)
- Spousal support payments paid- pursuant to court ordered documents
- Adoption expenses

Rental Properties

- Address of rental property & number of units
- Rental income by unit
- Rental expenses by unit & by category of expense
- Partners' names, addresses, SIN's & percent interest
- Details of any capital additions over \$500, including furnishings & appliances