

# Information to gather for preparing your tax return

Use the following checklist to gather information for the preparation of your tax return. Not every category will apply to you; this is just a suggested list. If you have any questions, please contact your income tax specialist or accountant.

## Sources of Income

INCOME	Form number	Check if applicable
RESP withdrawal benefits	T4A	
Employment	T4, T4A	
Partnership income	T5013	
Pension payments from employer	T4A	
Interest and dividends	T5	
Mutual funds and other trusts	T3	
Old age security	T4(OAS)	
Canada Pension Plan	T4A (P)	
Employment insurance	T4U	
RRSP or RRIF LIF income	T4RSP, T4RRIF	
Statement of securities transactions	T5008	
Capital gains/losses from other property		
Gains on securities transferred to RRSP or TFSA as contribution		
Social assistance, worker's compensation	T5007	
Support payments received (taxable/non-taxable)		
Foreign (e.g. U.S. social security) details and slips		
Details of any properties gifted to others		
Rental income		
Other		

## Deduction and credit information (official receipts)

DEDUCTION	Form number	Check if applicable
RRSP contribution receipt		
Charitable donation receipts		
Political donation receipts		
Professional dues receipts		
Tuition fees and educational expenses	T2202, T2202A*	
First Home Savings Account (FHSA)		
Home office and vehicle expenses (if your condition of employment requires you to work from home, incurring expenses)	T2200	
Eligible teaching supplies for educators		
Medical expense receipts		
Child care expenses		
Moving expenses		
Paid property tax receipts		
Paid rent receipts		
Installment payments made (your official record will be found with the February mailing notice)		
Paid support (child, spousal)		
Carrying charges and interest paid to earn income from investments		
Investment counsel and financial advisory fees		
Flow-through share expense deduction	T101	
Particulars of any other tax shelters that you owned		
Details of any properties gifted to others		
Tax shelters and flow-through investments		

\*If received from a dependent, please have dependent sign in the appropriate location on the form.

# Personal income tax checklist (continued)

**Notice of Assessment and all reassessments from the previous year**

**Self-employed income and expenses**

Your bookkeeper/accountant should prepare an income statement showing your total income and expenses incurred during the year.

**Rental income (includes property that you are renting outside Canada, if applicable)**

Prepare a comprehensive summary of total income received and a breakdown of expenses incurred for the calendar year (use a separate sheet of paper).

**Employment expenses**

Attach form T2200 signed by your employer if this applies to you and provide details on the car expenses and/or home office expenses that you incurred (use a separate sheet of paper).

**Foreign investments**

List your foreign assets, if aggregate cost exceeds \$100,000.

**Note:** CRA requires accountants to work from original copies.

The above list is not exhaustive; it is for guidance purposes only. If you have any questions as to what may be required for your personal tax situation, please speak with your accountant or tax specialist.



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