

# Personal Tax Checklist



## Income

- Employment (T4 or T4A)
- Government Pension (T4A[OAS], T4A[P])
- Employment Insurance (T4E)
- RRSP, RRIF, RESP (T4RSP, T4RIF, T4A)
- Estate, Trusts, Mutual Funds (T3)
- Investment Income (Interest (T3), Dividends (T5), Cap Gains (T5013))
- Self-Employed Income \*
- Rental Income \*\*
- Realized Gain/Loss Report for any Investments Sold

\* If you are self employed complete the self-employed income and expense summary sheet.

\*\* If you have rental properties, rental property summary

## Deductions

- RRSP Contributions
- Charitable or Political Donations
- Medical Expenses
- Childcare Expenses
- Union Dues and/or Professional Dues
- Tuition Fees (T2202A - Signed by Student)
- Teaching Supplies Paid for by Eligible Educator
- Interest Paid on Eligible Student Loans
- Spousal Support Payments
- Mobility Home Renovation Costs (Seniors over 65)
- Moving expenses if you moved more than 40km to start a new job or business.

## Other Considerations

- Did you sell your principal residence during the year?
- Did you sell any rental properties during the year?
- Do you have children in post-secondary education?



## Important Dates

March 1 (or February 29) ..... RRSP contribution deadline  
April 30 ..... Personal tax filing deadline  
June 15 ..... Self-employed filing deadline