

T1 PERSONAL INCOME TAX CHECKLIST

- 1) Personal Information Form (all clients)
- 2) Copy of the last return filed (new clients only)
- 3) Income information
 - a. Copy of all slips received for each year (T4, T4A, T4A, T4RSP, T4 RIF, T1032, T4A(P), T4(OAS), T5007/RL-5)
 - b. Copy of all investment income receipts (T3, T5, T5008, T5013, Statement of Gain (Loss)/Statement of Share Activity/Statement of Purchases and Sales)
 - c. If self-employed – statement of business/professional activities (see attached), balance sheet & income statement, access to bookkeeping data OR all invoices, receipts, bank statements, credit card statements, GST/PST returns filed, home office expenses (please provide: sq footage of home, sq footage of office, heat, electricity, insurance, rent or mortgage interest, repairs & maintenance, property taxes)
 - d. Statement of Rental Income and Expenses (see attached) OR all invoices, receipts, bank statements, credit card statements, GST returns filed (if applicable), etc.
 - e. Spousal Support Received (excluding child support)
- 4) Deductions
 - a. Receipts for medical expenses (prescriptions, optometry, physiotherapy, chiropractic, naturopathy, cost of exams, travel for medical if out of town, etc.) – see attached medical summary
 - b. Donation receipts
 - c. Dependent deductions: childcare, tuition, etc.
 - d. Disability form (if have one from doctor)
 - e. RRSP contribution slips
 - f. Union dues
 - g. Spousal Support payments (excluding child support)
 - h. Home buyer programs: First time home buyer credit and / or home buyer account contribution slips
 - i. Tuition T2202(A) form or interest on student loans
 - j. Volunteer firefighter letter or T4/T4(A)
 - k. Digital news subscription

- l. Moving expenses if moved for work or school (old address, new address, place of work/school address, date of move, hotel, flight, meals, gas, statement of adjustments from sale of home, statement of adjustment from purchase of new home, temporary living & storage costs, moving truck, incidental moving costs) – NOTE MAY USE PER DIEMS INSTEAD OF FUEL AND MEALS RECEIPTS
- m. Last year's invoice for income tax preparation (if not prepared by us)
- n. Employment expenses and work from home expense: T2200 Declaration of Conditions of Employment form filled out and signed by your employer. To claim actual expenses please provide: sq footage of home, sq footage of office, heat, electricity, insurance, rent or mortgage interest, repairs & maintenance, property taxes. Receipts for other expenses as applicable per your T2200 form.

5) Rent paid in 2025 (if applicable) – BC Refundable Credit

6) Other – any other information that you may have that might be useful in the preparation of your income tax returns. For example, northern residency, sale of principal residence information (see Personal Tax Intake Form), home renovation information for Seniors and Persons with Disabilities, etc.

WAYS TO SAVE ON YOUR TAX PREPARATION FEES

1. Documentation

- a. Please make sure the personal information form is filled in as much as possible to ensure we have accurate and complete information.
- b. Review the checklist carefully to ensure you have provided us with the required information.
- c. Make sure you have everything before bringing it in. The more times we need to go into your return and update, the more time it will take overall.

2. Organization

- a. Slips should be sorted by taxpayer and in alphabetical order
 - i. Deductions pertaining to a specific individual should be behind the slips (for example, union dues).
 - ii. Deductions that are shared or could go on either spouse (if applicable) should be grouped by type and a total provided, so for example: donations should be all together with a total, then medical expenses with a total, medical travel should include a list of trips made for medical reasons (who, when, what for and where). The kms should be included and totalled for mileage reimbursement.
 - iii. Other, clearly identifying and separating each item

3. Rental Income and Self Employment

- a. If you provide the totals per category, we will not have to prepare and charge for bookkeeping. Providing these amounts will help save time but also be a double check for you to make sure you have everything
- b. Ask us for templates if you are not sure how these should be categorized and tallied.