



# Lovelyday Empire Consultants Inc.

Bookkeeping, Accounting, CFO, Tax & Personal Finance.

www.lovelydayempire.com | lovelydayempire@gmail.com | 905-984-9363

## Personal Tax Return Checklist (Canada)

### 1. Personal Information

- Full legal name as written on SIN
- Date of birth
- SIN (Social Insurance Number)
- Current address
- Marital status
- Spouse/common-law partner information (Name, Date of Birth, Net Income if filing separately)
- Dependants' information (Name, date of birth, Net Income)
- Copy of prior year tax return and Notice of Assessment

### 2. Employment Income

#### T-Slips

- T4 – Employment income
- T4A – Pension, self-employment, scholarships, commissions
- T4E – Employment Insurance (EI)
- T4RSP – RRSP withdrawals
- T4RIF – RRIF income
- T4PS – Profit-sharing plans

#### Employment Expenses (if applicable)

- T2200 signed by employer
- Home office expenses
- Vehicle expenses
- Supplies and tools
- Professional dues
- Travel expenses

### 3. Self-Employment / Business Income

- Business income summary
- Sales records/invoices



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- Expense receipts
- Bank statements
- Credit card statements
- Vehicle mileage log
- Home office expenses
- GST/HST filings (if registered)

## 4. Investment Income

### Investment Slips

- T3 – Trust income
- T5 – Investment income
- T5008 – Securities transactions
- T5013 – Partnership income

### Additional Investment Documents

- Capital gains/loss summaries
- Cryptocurrency transactions
- Foreign investment income
- Interest income statements
- Dividend statements

## 5. Rental Property Income

- Rental income summary
- Mortgage interest statements
- Property tax bills
- Insurance expenses
- Repairs and maintenance receipts
- Utility bills
- Property management fees
- Vehicle expenses related to rental property

## 6. Retirement & Pension Income

- T4A(P) – CPP benefits
- T4A(OAS) – Old Age Security



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- Pension slips
- Annuity income statements
- Foreign pension income

### 7. Government Benefits & Assistance

- Social assistance income
- Workers' compensation benefits
- COVID-related benefit slips (if applicable)

### 8. Deductions

#### RRSP Contributions

- RRSP contribution receipts
- FHSA contribution receipts

#### Other Deductions

- Union/professional dues
- Childcare expenses
- Moving expenses
- Support payments made
- Interest paid on student loans
- Carrying charges and investment fees

### 9. Tax Credits

#### Medical Expenses (amounts not covered by insurance)

- Medical receipts
- Prescription receipts
- Dental expenses
- Health insurance premiums

#### Education Credits

- T2202 tuition slip



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- Student loan interest
- Scholarship information

## Other Credits

- Charitable donation receipts
- Political contribution receipts
- First-Time Home Buyers' information
- Home accessibility expenses
- Multigenerational home renovation expenses

## 10. Homeowner Information

- Property tax statements
- Home purchase/sale documents
- Mortgage statements
- Principal residence sale information

## 11. Foreign Income & Assets

- Foreign bank account details
- Foreign employment income
- Foreign investment statements
- Details of foreign property over CAD \$100,000 (T1135 reporting)

## 12. Family Information

### Spouse Information

- Income slips
- Tuition transfers
- Medical expenses

### Dependants

- Childcare receipts
- Tuition receipts
- Disability tax credit forms



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- Medical expenses

### 13. Special Situations

#### Students

- Tuition receipts
- Scholarship/bursary slips
- Student loan information

#### Seniors

- Pension splitting details
- Caregiver expenses
- Medical travel expenses

#### New Immigrants/Emigrants

- Date of entry/departure
- Foreign income before residency

### 14. Tax Installments & CRA Information

- CRA instalment reminders/payments
- CRA correspondence
- Notice of Assessment/Reassessment
- CRA My Account access (If you require Rep a client)

#### Other Client Questions

- Did you buy or sell property?
- Did you work from home?
- Did you earn any side income?
- Did you trade cryptocurrency or stocks?
- Did you move during the year?
- Did you receive foreign income?
- Did your marital status change?



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Did you support dependents or parents?