

T1 Checklist

Personal information:

- Please note any change in address
- Please provide a list of dependents/children with their birth dates and income
- Please notify us of a change in your marital status in 2018 and on what date the status changed
- Please note whether you owned foreign property at any time in 2018 with a cost in excess of \$100,000
- Please note if you are a US citizen since it is likely you have US filing requirements
- Documents related to the sale of any property, including your principle residence

Employment income:

- T4 slip which reports employment income
- T4A slip which reports other employment income and self-employed commissions
- T4PS slip which reports benefits received from an Employee Profit Sharing Plan
- A T2200 form signed by your employer if you are claiming employment expenses
- A summary of employment expenses, including a vehicle log book
- If you are an apprentice, a summary of tools purchased
- Any stock option income not reported on a tax information slip
- Professional/union dues receipts

Investment income:

- T3 and T5 slips which report investment income
- A summary of investment purchases and sales during the year
- Details of the cost of investments sold during the year if it is not included in the investment sale summary
- Details of interest paid to earn investment, property or business income
- Details of investment management, accounting and safety deposit box fees
- Details of investment income that was not reported on a T3 or T5 slip
- Details of any investment properties such as real estate sold during the year

Pension income:

- T4RSP and T4RIF slips which report withdrawals from RRSP's and RRIF's
- T4A(P) slip which reports CPP income
- T4A(OAS) slip which reports Old Age Security income
- T4A slips reporting pension income
- Details of other foreign pensions received (US Social Security, other overseas pension etc.)

Rental:

- Summary of rental revenue and expenses for the year
- Details of capital purchases during the year (for example a building addition)

Business:

- Summary of business revenue and expenses for the year
- Details of capital equipment and property purchases during the year
- Details of vehicle purchases during the year
- Details of equipment, vehicle and real estate sales during the year
- Summary of business use of vehicle (business km compared to total km), including a vehicle log book
- Summary of business use of office in home

Farm:

- Summary of farm revenue and expenses for the year
- Details of farm subsidies received
- Details of capital equipment and property purchases during the year
- Details of vehicle purchases during the year
- Details of equipment, vehicle and real estate sales during the year

Other:

- T4E slips which report benefits such as maternity, unemployment etc.
- T4A slips which report scholarships etc.
- RRSP contribution receipts
- Details of any RRSP Home Buyers' Plan or Lifelong Learning Plan withdrawals and repayments
- T2202 slips from post-secondary education to report tuition fees paid for yourself or any of your dependents
- T5013 slip that reports income earned from a partnership
- Details of child care expenses
- Details of spousal and child support received or paid during the year
- Medical expense receipts
- Details of any expenses paid in the process of adopting a child
- Charitable donation receipts
- Political donation receipts
- Summary of moving expenses
- If you were a first time home buyer please provide the address of the home
- Interest paid on student loans that are registered under the Canada Student Loans Act
- A completed T2201 form if you, your spouse or one of your dependents became disabled during the year

Please note that this checklist is not an all-inclusive checklist of the information that we may require to complete your return. Please contact us if you have any questions about details of your particular situation that is not mentioned above.