

JINYU YANG & COMPANY

Certified General Accountant

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Documents Checklist for T1 Personal Tax Return

- ✓ **Basic Information**
 - Social Insurance Numbers
 - Dates of births for family members
 - Address
 - Telephone number
 - Foreign property over \$100,000
 - Sending info to Elections Canada
- ✓ **Copy of last year's Notice of Assessment from CRA**
- ✓ **Employment Income**
 - T4
 - T4A
 - T4E
 - T4PS
- ✓ **Employment Expenses**
 - T2200 plus a list of expenses
- ✓ **Pension Income**
 - T4AOAS
 - T4AP
 - T4A
 - T4RSP
 - T4RIF
- ✓ **Investment Income**
 - T3
 - T5
 - T5008
 - T5013
- ✓ **Capital Gains**
 - T5013
 - Trading Summaries from Brokers
- Annual statements from Mutual Funds
- ✓ **Other Income**
 - Universal child care RC62s
 - Rental income and expenses
 - Self-employed income and expenses
- ✓ **Deductions and Credits**
 - RRSP (must be official receipts)
 - Investment advice and accounting fees paid
 - Interest on investment loans
 - Safety deposit box fees
 - Tuition Fees - T2202/2202A, TL11
 - Union/Professional dues
 - Support payment information
 - Child care receipts
 - Donations (must be official receipts)
 - Instalment payment information
 - Medical/Dental/Optical receipts (less any reimbursements from Insurance)
 - Private Health Plan Premiums
 - Student Loan Interest slips
 - Monthly bus passes
 - Child fitness classes receipts
 - Home renovation receipts
 - First time home buyer