

Personal Income Tax Return Checklist

Personal Information

- Current Address
- Telephone Number/Cell Number/Fax Number
- Date of Birth
- Marital Status/Date of change in marital status
- Spouses Date of Birth
- Spouses Social Insurance Number
- Dependants/Dependants Date of Birth

Income

- Salary
- Commission
- Director's Fees
- Self Employed Income - with schedule of expenses
- Pension Income
- Unemployment Insurance Benefits
- Worker's Compensation Income
- Family Benefit Income
- Dividends and Interest Income
- Rental Income - with schedule of gross rents and expenses
- Spousal Support Income
- Child Support Income that results from a court order prior to May 1997
- Capital Gains and Losses - for each transaction provide name of security, number of shares purchase date, purchase price, sales price, costs of purchase and sale
- Any other income not mentioned above

Deductions from Income

- Self employed expenses
- Registered Retirement Savings Plans
- Union, Professional or like dues
- Childcare expenses
- Allowable Business Investment loss on disposition of share or debt in a Canadian-controlled private corporation
- Safety deposit box charges
- Accounting fees
- Interest costs to earn investment income/ Investment counsel fees
- Carrying charges
- Auto expenses - Cost of car, operating expenses including gas, parking, lease payments, repairs and maintenance, percentage of personal use, total kilometers, business kilometers
- Office in home - if principal place of business, operating costs, equipment used, sq. ft. of office, sq. ft. of home
- Spousal Support Payments - name and address to whom paid
- Child Support Payments – name and address to whom paid, if resulting from a court order prior to May 1997
- Repayment of Unemployment Insurance Benefits
- Moving expenses - attach details
- Commission expenses - if you were remunerated on a commission basis, detail expenses incurred in earning your commissions
- Medical expenses for yourself or dependent
- Charitable donations
- Tuition fees
- Disability certificate from Doctor
- Rental payments
- Property Tax payments
- Ontario political contributions
- Foreign tax paid
- Business Investment Tax Credit
- Federal political contribution
- Any other deductible item not mentioned above