



# Accounting & Tax Services

700 Dundas Street East, Suite 14,  
Mississauga, ON, L4Y 3Y5  
Phone (905) 276-0878, Fax (416) 946-1839  
Email: [info@makaccounting.ca](mailto:info@makaccounting.ca)

## Personal Income Tax Checklist

(Print This Page and mark cross (X) for each item applicable to you)

### Income Items

- Previous year's tax return
- Previous year's Notice of Assessment and Mailing Label
- All information slips (eg. T4, T4A, T4A(OAS), T5, T3, T5007, RC62)
- Investment income not on slips (Interest, Dividends, Capital gains)
- Partnership statements
- Rental property income and expenses
- Business or professional income and expenses
- Sale of property including books, bonds, and real estate - provide details
- Other income (eg. RRSP withdrawal, foreign pension income)

### Deductions

- RRSP contributions
- Union or Professional Dues
- Childcare expenses
- Interest expenses related to business or investments
- Safety Deposit Box
- Alimony or Child Support
- Moving expenses
- Employment expenses
- Prior Year Losses

### Tax Credits

- Medical Expenses
- Disability
- Tuition fees - Form T2202A signed by student
- Public transit passes amount
- Children's fitness amount
- Charitable donations
- Political donations
- Tax installments - TD7 slips or details
- Property taxes or rent paid - provide details

### Personal

- Spouse - provide social insurance number, date of birth, income and deductions
- Dependents - provide social insurance number, date of birth and net income