

BEJEWELED

BOOKKEEPING SERVICES

YOUR GUIDE TO

PERSONAL TAX

CHECKLIST

A practical checklist to help you get organized before tax time.

www.bejeweledbookkeeping.com

Personal Tax

Use this checklist to gather your slips, receipts, and supporting documents before your personal tax return is prepared. The more organized your records are, the smoother tax filing becomes.

Income Slips

<input type="checkbox"/> T4 employment income slips
<input type="checkbox"/> T4A pension, self-employment, commission, or other income slips
<input type="checkbox"/> T5 investment income slips
<input type="checkbox"/> T3 trust income slips
<input type="checkbox"/> RRSP income or withdrawal slips
<input type="checkbox"/> EI, CPP, OAS, or pension slips, if applicable

Common Deductions & Credits

<input type="checkbox"/> RRSP contribution slips
<input type="checkbox"/> Childcare receipts
<input type="checkbox"/> Donation receipts
<input type="checkbox"/> Medical expense receipts
<input type="checkbox"/> Tuition forms such as T2202
<input type="checkbox"/> Student loan interest statements, if applicable

Family & Personal Information

<input type="checkbox"/> Full legal name and current address
<input type="checkbox"/> Date of birth and SIN
<input type="checkbox"/> Marital status and spouse information
<input type="checkbox"/> Dependent children information
<input type="checkbox"/> Notice of Assessment from last year
<input type="checkbox"/> CRA online access or authorization details, if needed

Home, Rent, and Other Details

<input type="checkbox"/> Rent paid or property tax details, if applicable
<input type="checkbox"/> Moving expense details, if eligible
<input type="checkbox"/> Employment expense form T2200, if applicable

- Union or professional dues
- Digital news subscription receipts, if applicable

Final Review Before Filing

- Confirm all slips have been received
- Check direct deposit information with CRA
- Confirm address and marital status are current
- Review tax owing or refund estimate before filing
- Keep a copy of final return and Notice of Assessment

Helpful Notes

Not every item will apply to every taxpayer.

Keep receipts and support documents for CRA review even if they are not submitted with the return.

Ask for advice before claiming items you are unsure about.