



INDIVIDUAL INCOME TAX (T1 RETURN) CHECKLIST

PERSONAL, SPOUSAL AND INCOME INFORMATION

If you are behind on personal taxes or need to file, we prioritize maximizing available refunds and applying relevant federal and provincial tax credits and deductions. New clients should complete every section that applies and attach the supporting documents identified below.

PERSONAL INFORMATION

Tax year: **SIN:**

Name: **Email:**

Phone: **Birthdate:**

Address:

- Are you a Canadian citizen? ☐ Yes ☐ No
- Do you authorize CRA to provide information to Elections Canada? ☐ Yes ☐ No
- During the year, did you own foreign property costing more than \$100,000 CAD? ☐ Yes ☐ No
- Would you like to sign up for online mail from CRA? ☐ Already have ☐ Yes ☐ No

SPOUSAL INFORMATION

Marital status: ☐ Married ☐ Common-law ☐ Widowed ☐ Divorced ☐ Separated ☐ Single

Has your marital status changed during the year? ☐ Yes ☐ No

Date of change: **Spouse name:**

Birthdate: **SIN:**

Net income:

If we are not preparing your spouse's tax return, complete all spouse fields above.

PERSONAL INCOME

- Were you an employee during the year? ☐ Yes ☐ No
- ☐ Include all T4 and T4A slips received during the year.
- ☐ Include T4E and T5007 slips from Service Canada, if applicable.
- ☐ Provide the amount of tips received during the year, if applicable.
- Did you operate your own business during the year? ☐ Yes ☐ No
- ☐ Complete the Business Income and Employment Expenses section.
- Did you receive emergency income or government benefits during the year? ☐ Yes ☐ No
- ☐ Include any related T4A slips received from Service Canada.
- Were you retired during the year? ☐ Yes ☐ No
- ☐ Include T4A and T4RIF slips for each pension received.
- ☐ Include T4A(P) and T4A(OAS) slips for CPP or OAS benefits.
- Did you own investments outside a Tax-Free Savings Account or RRSP during the year? ☐ Yes ☐ No
- ☐ Complete the Rentals and Investments section.
- Did you own a rental property during the year? ☐ Yes ☐ No
- ☐ Complete the Rentals and Investments section.



EXPENSES

- Did your employer require you to incur costs as part of your employment, including working from home? ☐ Yes ☐ No
☐ Complete the Business Income and Employment Expenses section.
- Did you pay union or professional dues? ☐ Yes ☐ No
☐ Include copies of the receipts.
- Did you incur medical expenses? ☐ Yes ☐ No
☐ Include medical receipts. Cash-register receipts alone are not sufficient.
- Did you donate funds to a charity or political party? ☐ Yes ☐ No
☐ Include the official donation receipts issued.
- Were you enrolled in post-secondary school full-time or part-time? ☐ Yes ☐ No
☐ Include a T2202 tuition slip from each school attended.
☐ If a student loan is in repayment, include the repayment schedule from NSLSC.
- Did you pay rent or property taxes during the year? ☐ Yes ☐ No
☐ Provide the total paid, the recipient's name and supporting receipts.
- Did you have a Canadian digital news subscription? ☐ Yes ☐ No
☐ Include copies of the receipts.

OTHER

- Did you pay personal income tax by instalments for the year? ☐ Yes ☐ No
☐ Include the CRA statement of account showing instalments paid for the year.
☐ Include all Notices of Assessment or Reassessment received.
- Do you have children? ☐ Yes ☐ No
☐ Complete the Dependant section.
- Did you pay or receive child or spousal support payments? ☐ Yes ☐ No
☐ Complete the Support Payments section.
- Do you, or anyone in your care, have a physical or mental disability? ☐ Yes ☐ No
☐ Complete the Family Disabilities section.
- Did you adopt a child during the year? ☐ Yes ☐ No
☐ Include receipts associated with the adoption.
- Did you volunteer as a firefighter or search-and-rescue volunteer? ☐ Yes ☐ No
☐ Include the applicable work or service documentation.

INVESTMENTS

- Did you contribute to your RRSP before March 1 of the current year? ☐ Yes ☐ No
☐ Include contribution receipts for the remainder of the previous year.
☐ Include contribution receipts for the first 60 days following the year.
- Did you withdraw money from your RRSP? ☐ Yes ☐ No
☐ Include all T4RSP slips.
- Did you sell securities held outside an RRSP or TFSA during the year? ☐ Yes ☐ No
☐ Include the capital gains report for the year.
☐ Include broker statements if we track adjusted cost bases for you.
- Did you earn income from investments held outside an RRSP or TFSA? ☐ Yes ☐ No
☐ Include T5 slips received for the year.
☐ Include T3 and T5013 slips received for the year.



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DEPENDANT WORKSHEET

CHILDREN

Enter details for each child. Use the notes box below if additional space is needed.

Name	Birthdate	SIN	Lives with me (Y/N)	Gender

Primary residence:

If you are not married or common-law, state with whom the children primarily reside.

Did you send your children to camp or pay for childcare, including a nanny?

☐ Yes

☐ No

☐ Include copies of the receipts.

Did you enrol your children in supervised activities lasting more than one hour?

☐ Yes

☐ No

☐ Include copies of the receipts.

Did your child attend post-secondary education?

☐ Yes

☐ No

☐ Include the child's T2202 tuition slip from the university or college.

SUPPORT PAYMENTS

Support payments were:

☐ Paid by me

☐ Received by me

Spouse name:

Spouse SIN:

Child support:

Spousal support:

FAMILY DISABILITIES

Does a dependant or other person in your care have a disability?

☐ Yes

☐ No

☐ Include Form T2201 - Disability Tax Credit Certificate completed by the medical practitioner, if available.

Please call or email us to discuss the specific circumstances and any supporting care or dependency information.

ADDITIONAL DEPENDANT DETAILS OR NOTES



RENTAL PROPERTY

Was the rental property purchased or sold during the year?

☐ Yes

☐ No

☐ Include all purchase and sale documentation.

☐ Include a summary of income and expenses for each rental property owned.

Address:

Number of units:

Personal portion (%):

Total rent revenue:

Advertising:

Utilities:

Property taxes:

Repairs:

Insurance:

Interest:

Other rental expenses (description and amount)

For additional rental properties, attach a separate completed rental-property worksheet.

BUSINESS INCOME

Do you have a GST/HST return that needs to be filed?

☐ Yes

☐ No

☐ Include the GST/HST form or filing details, including the access code if applicable.

☐ Include the CRA statement of account showing instalments paid for the year.

Are computerized accounting records maintained?

☐ Yes

☐ No

☐ Include the profit and loss statement for the year, if complete.

☐ Include a summary of income and expenses for each business operated.

Business name:

Occupation:

Total revenue:

Cost of sales:

Advertising:

Meals & entertainment:

Insurance:

Licences & memberships:

Office:

Salaries & subcontracting

Travel:

Telephone & internet:

Rent:

Home office & automobile

Other business expenses (description and amount)



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EMPLOYMENT, HOME OFFICE AND AUTOMOBILE WORKSHEETS

EMPLOYMENT EXPENSES

Do you have a signed T2200 - Declaration of Conditions of Employment?

☐ Yes

☐ No

☐ Include a copy of the signed T2200.

Did you work from home due to COVID-19?

☐ Yes

☐ No

☐ Include a signed T2200S, if applicable, and complete the Home Office section.

Does your employer collect GST/HST on its revenue?

☐ Yes

☐ No

☐ Unsure

Employment expenses incurred during the year

Advertising:

Meals & entertainment:

Cell phone:

Tools & supplies:

Assistant salary:

Home office & automobile

HOME OFFICE EXPENSES

Internet:

Business use (%):

Heat:

Electricity:

Insurance:

Maintenance:

Mortgage interest:

Property tax or rent:

Other home-office expenses (description and amount)

Days worked from home:

My home office is:

☐ Dedicated office space

☐ Shared office space

Example: dining room

AUTOMOBILE EXPENSES

Did you purchase or lease a new vehicle during the year?

☐ Yes

☐ No

☐ Include a copy of the purchase or lease agreement.

Make / model:

Year:

Total km driven:

Business km driven:

Fuel:

Insurance:

Licence:

Maintenance:

Leasing:

Parking:

407 tolls:

Other vehicle expense:

Additional automobile expenses (description and amount)

ADDITIONAL EMPLOYMENT, HOME-OFFICE OR AUTOMOBILE NOTES