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## *Personal Tax Checklist*

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# Personal Tax Checklist

Hi, Friend!

Thank you so much for trusting us to help you through the tax season. If you are a Sole Proprietor, this list is also for you as you will be filing your expenses through your personal taxes.

We understand how cumbersome the whole process can be to file your personal taxes, like figuring out what all of the tax credits and deductions are that you may be eligible for, it really can be a lot.

To help with this process it is really important to have a tax checklist to help you in the process of tracking income, expenses and deductions.

Whether you are seeking help with a professional or filing your own taxes, this checklist will be most helpful to you!

So go ahead and print off the next 2 pages and check things off as you go, as and if each point is relevant to you.

Feel free to share this list with your friends and family and pull it out again next year when it's time to repeat the process.

There you have it, folks. We hope this helps and Happy Taxing!

Thank you; Milgwetch,  
**Shelilia Vivier**  
*President & CEO*  
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# Personal Tax Checklist

## SLIPS

- T4 slips (Employment Income)
- T4E (Employment Insurance benefits)
- T3/T5/T5008 (interest, mutual funds/dividends)
- T2202A (tuition/education receipts)
- T4A-OAS/T4A (Old Age Security & CPP (Canada Pension Plan) benefits)
- T4A (other pensions and annuities)
- T5007 (Social Assistance payments/ Worker Compensation benefits)

## RECEIPTS

- RRSP contribution receipts
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses (tradespersons & apprentice mechanics)
- Other employment expenses
- Teachers school supplies
- Medical expenses
- Home renovations (seniors & disabled)
- Transit pass receipt
- Charitable donations
- Political donations
- Childcare expenses
- Adoption expenses
- Moving expenses
- Interest paid on student loans
- Carrying charges & interest expenses
- Office-in home expenses
- Exams for professional certification

# Personal Tax Checklist

## OTHER DOCUMENTATION

- Sale of principal residence
- Sale or deemed sale of stocks, bonds or real estate
- Northern residents' deductions receipts
- Rental income & expenses receipts
- Business, farm, or fishing income/expenses
- Automobile/ travel logbook & expenses
- Disability Tax Credit Certificate
- T2200 (declaration or condition of employment)
- Volunteer Firefighters certification
- Search and Rescue volunteers certification
- Written certification for eligible educators school supplies

## SOLE PROPRIETOR

- All your T slips for the year
- Information of any other income
- Business income & expenses compilation for the year
- Invoices/receipts/payroll & GST/HST

## ADDITIONAL LIST IF NEEDED

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