

## T1 INDIVIDUAL TAX RETURN CHECKLIST

### Personal Information

- SIN for you, spouse/partner, and dependants
- Current address and phone number
- Marital status changes
- Direct deposit banking details
- Residency status for the tax year
- CRA My Account access

### Income Slips

- T4 – Employment income
- T4A – Pension, self-employment, commissions, scholarships
- T4E – Employment Insurance
- T4RSP / T4RIF – RRSP/RRIF withdrawals
- T4A(OAS) – Old Age Security
- T4A(P) – CPP benefits
- T5007 – Social assistance or workers' compensation
- T5 – Interest & dividends
- T3 – Trust/mutual fund income
- T5008 – Investment trades (capital gains)
- T5013 – Partnership income
- Crypto trading summaries
- Self-employment income & expenses
- Rental income & expenses
- Foreign income statements
- Sale of principal residence details

### Deductions

- RRSP contributions (including first 60 days)
- Union/professional dues
- Childcare expenses
- Moving expenses
- Support payments made

- Employment expenses (T2200/T2200S)
- Student loan interest
- Investment carrying charges
- Business or rental expenses
- Vehicle mileage logs

#### Credits & Benefits

- Medical expenses
- Disability Tax Credit (T2201)
- Canada caregiver amount
- Tuition (T2202)
- Charitable donation receipts
- Adoption expenses
- Home accessibility expenses
- First-time home buyer information
- Ontario property tax or rent (OTB)
- Home office expenses

#### Contribution Limits & Carry-Forwards

- RRSP contribution room
- TFSA contribution room
- FHSA contributions/withdrawals
- Tuition carry-forward amounts
- Capital loss carry-forwards

#### Final Checks Before Filing

- Compare slips with CRA My Account
- Report foreign property over \$100,000 (T1135)
- Report principal residence sale (Schedule 3)
- Confirm instalment payments made
- Review prior Notice of Assessment
- Keep all receipts for six years

#### Deadlines

- **April 30** – Filing deadline & tax payment due

- **June 15** – Filing deadline for self-employed (payment still due April 30)