



Personal Tax (T1) Checklist

Gather these before your personal tax appointment so we can file accurately and on time.

INCOME SLIPS

- | | |
|--|--|
| ☐ T4 — employment income | ☐ T5 — investment income |
| ☐ T4A — pensions / other income | ☐ T3 — trust income |
| ☐ T4E — employment insurance | ☐ T5008 — securities transactions |
| ☐ T4A(P)/T4A(OAS) — CPP / OAS | ☐ Foreign income details |

DEDUCTIONS & CREDITS

- | | |
|---|--|
| ☐ RRSP contribution receipts | ☐ Tuition (T2202) & student loan interest |
| ☐ Medical expense receipts | ☐ Union / professional dues |
| ☐ Donation receipts | ☐ Moving expenses (if eligible) |
| ☐ Childcare expense receipts | ☐ Digital news subscription receipts |

IF APPLICABLE

- | | |
|--|--|
| ☐ Rental income & expense records | ☐ Vehicle mileage log |
| ☐ Self-employment income & expenses | ☐ Sale of property / principal residence info |
| ☐ Home-office details | ☐ Foreign property over \$100,000 (T1135) |

ALSO BRING

- | | |
|--|---|
| ☐ Prior-year Notice of Assessment | ☐ Any CRA letters received |
| ☐ Direct-deposit / banking info | ☐ Changes in marital status / dependants |

General information only, not tax advice. Requirements vary by situation — contact AccFin Inc. for guidance specific to you. Yashu Bansal — FCA (ICAI, India) · ACA & BFP (ICAEW, UK) · RPA (Canada) · QuickBooks Certified ProAdvisor. Services provided on a non-assurance basis.