

2022 Personal Income Tax Checklist

Please include the following information for each taxpayer:

(If applicable, please check box (✓) if the information is included)

Copy of 2021 Notice of Assessment and prior years' Notice(s) of Reassessment (if applicable)

All income information slips

Employment T4 T4A
COVID-19 Support T4A
(CRB, CRSB, CRCB)
Partnership income T5013
Pension payments from employer T4A
Interest and dividends T5
Mutual fund and other trusts T3
Old Age Security T4A (OAS)

Canada Pension Plan T4A (P)
Employment Insurance T4E
Income from RRSP T4RSP
Income from RRIF T4RIF
Purchase and sale of securities T5008
Social assistance, WSIB T5007
Other (specify) _____

All official receipts:

RRSP contributions, including
first 60 days of 2023
Charitable donations
Political donations
Professional dues

Disability tax credit certificate T2201
Tuition and enrollment certificate T22022
¹If receipt is from a dependant, please have dependant sign in appropriate place on the form (reverse). If we are not completing dependant's return, please complete the income portion of the form

Self-employment income and expenses (Include HST and COVID-19 support information, if applicable)

Rental property income and expenses (Include HST and COVID-19 support information, if applicable)

Details of employment expenses (Employees must include form T2200 signed by their employer)

Home Office Expenses – COVID-19 Special Deduction (<https://www.canada.ca/en/revenue-agency/services/tax/individuals/topics/about-your-tax-return/tax-return/completing-a-tax-return/deductions-credits-expenses/line-229-other-employment-expenses/work-space-home-expenses.html>)

Other items:

Support/alimony payments (Please include amount paid or received, the name, address and SIN of payee or recipient, and copy of the support agreement)

Child care expenses (Please include receipts)

Moving expenses (Please include receipts)

Medical expenses (Please include official receipts showing payment)

Property taxes or rent paid in the year (Please include the number of months at each location, the address of each location and to whom the amounts were paid)

Home accessibility expenses (For seniors and the disabled. Please contact us for more information.)

Carrying charges and interest paid to earn income from investments

Other Credits: Interest paid on student loans, tradesperson's tools expenses, &/or teaching supplies expenses (for educators only)

Details of disposition of stocks, bonds and mutual funds. (Please include investment broker monthly statements and year end summaries provided by broker)

Disposition of real estate including your principal residence (Please include proceeds of sale, sale date, and ownership. For sales of property other than a principal residence please also include purchase date and original cost)

Direct Deposit (Please include a void cheque for direct deposit if desired, unless already registered)

Instalment payments made during the year (Please include year end statement from CRA)