

LDA INCOME TAX SERVICES

Personal Income Tax Checklist

Please provide the following documents that apply to you. **If you are unsure whether something is needed, send it to us and we will review it.**



PERSONAL INFORMATION

- ☐ Full name, address & date of birth
 - ☐ Social Insurance Number (SIN)
 - ☐ Marital status & spouse/common-law partner information
 - ☐ Names & dates of birth of dependants/children
 - ☐ Previous year's Notice of Assessment
 - ☐ Any changes to your address, marital status or family situation
-



INCOME

- ☐ T4 – Employment income
 - ☐ T4A / T4A(OAS) / T4A(P) – Pension & other income
 - ☐ T4E – Employment Insurance
 - ☐ T5 – Interest & dividends
 - ☐ T3 – Trust/investment income
 - ☐ T5007 – Workers' compensation or social assistance
 - ☐ T5008 – Securities transactions
 - ☐ Employment or other income not shown on a tax slip
 - ☐ Foreign income, if applicable
-



INVESTMENTS & RETIREMENT

- ☐ RRSP contribution receipts
- ☐ RRSP withdrawals
- ☐ FHSA contributions or withdrawals
- ☐ TFSA withdrawals/transfers, if applicable

- ☐ Investment purchase/sale statements
 - ☐ Cryptocurrency transactions, if applicable
-

HOME & RENTAL PROPERTY

- ☐ Rent paid during the year
 - ☐ Property tax information
 - ☐ First-time home purchase information
 - ☐ Home Buyers' Plan information
 - ☐ Rental property income & expenses, if applicable
 - ☐ Property purchase or sale information
-

MEDICAL & OTHER TAX CREDITS

- ☐ Medical & dental receipts
 - ☐ Prescription medication receipts
 - ☐ Glasses/contact lenses
 - ☐ Medical insurance premiums, if applicable
 - ☐ Charitable donation receipts
 - ☐ Childcare expenses
 - ☐ Eligible dependant expenses
 - ☐ Disability-related information, if applicable
-

EDUCATION

- ☐ T2202 – Tuition & enrolment certificate
 - ☐ Student loan interest
 - ☐ Unused tuition amounts from previous years
-

SELF-EMPLOYMENT / BUSINESS

If you are self-employed or operate a business, please provide:

- ☐ Total business income
 - ☐ Business expenses
 - ☐ Vehicle expenses & business kilometres
 - ☐ Home-office expenses, if applicable
 - ☐ Business equipment purchases
 - ☐ GST/HST information, if applicable
-

SPECIAL SITUATIONS

Please tell us if you:

- ☐ Became a resident of Canada during the year
 - ☐ Left Canada during the year
 - ☐ Earned income outside Canada
 - ☐ Own foreign investments/property
 - ☐ Sold a property or investment
 - ☐ Received an inheritance
 - ☐ Received CRA correspondence or were reassessed
 - ☐ Need to file or correct a previous year's return
-

BEFORE SENDING YOUR INFORMATION

- ☐ I have provided all income slips I received.
- ☐ I have included receipts for deductions/credits I may be entitled to.
- ☐ I have advised LDA of any major changes during the year.
- ☐ I have provided any CRA letters or reassessments I received.

Not sure if you need to provide something?

Send it to us. We will review it and determine whether it is required.

LDA INCOME TAX SERVICES

Personal Tax Returns • Back Taxes • CRA Assistance • Tax Planning • Bookkeeping

 647-980-6298

 info@lda-itb.com

 lda-itb.com

“It’s not what you make — it’s what you keep.”