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2022 PERSONAL INCOME TAX CHECKLIST

Information slips

- | | |
|---|--|
| <input type="checkbox"/> T4 – Employment income | <input type="checkbox"/> T3, T5, T5013, and T5008 – Investment and partnership income |
| <input type="checkbox"/> T4A, T4A(P), and T4(OAS) – Retirement/other, CPP, and OAS slips | <input type="checkbox"/> T5007 – Social assistance and Worker’s compensation |
| <input type="checkbox"/> T4E – Employment insurance benefits | <input type="checkbox"/> Any other T-slips |
| <input type="checkbox"/> T2202 or TL11 – Tuition | |

Receipts

- | | |
|--|---|
| <input type="checkbox"/> Charitable or political donations | <input type="checkbox"/> Professional or union dues (not included on T4) |
| <input type="checkbox"/> RRSP contributions | <input type="checkbox"/> Moving expenses |
| <input type="checkbox"/> Medical, medical travel greater than 40 km, and nursing home expenses | <input type="checkbox"/> T2200 – employment expenses, including school supplies and tool expenses |
| <input type="checkbox"/> Childcare expenses | <input type="checkbox"/> Home renovation/accessibility expenses |
| <input type="checkbox"/> Student loan interest | <input type="checkbox"/> Statement of adjustments from any property sales (including principal residence) |

Other information

- | | |
|---|--|
| <input type="checkbox"/> Prior year’s Notice of Assessment | <input type="checkbox"/> Rental property – income and expenses |
| <input type="checkbox"/> Other CRA correspondence | <input type="checkbox"/> Self-employed people and commissioned employees – income and expenses |
| <input type="checkbox"/> Dependent information | <input type="checkbox"/> Volunteer firefighter’s or Search and Rescue Certificate |
| <input type="checkbox"/> Capital gains information, if no T5008 | <input type="checkbox"/> Investment charges and interest expense from investing |
| <input type="checkbox"/> Child and/or spousal support | |
| <input type="checkbox"/> Disability Tax Credit (DTC) | |



CPA CHARTERED PROFESSIONAL ACCOUNTANTS

Members of
Chartered Professional Accountants of British Columbia

* Providing professional services through a corporation