

Prismledger – Personal Tax Checklist

Use this checklist to prepare your Canadian personal tax return.

1. Personal Information

- SIN number
- Date of birth
- Current address
- Marital status (and spouse details)
- Direct deposit banking info

2. Income Slips

- T4 – Employment Income
- T4A – Pension, Self-Employment, Scholarships
- T5 – Investment Income
- T3 – Trust Income
- T4E – Employment Insurance
- T5007 – Social Assistance / Workers Compensation
- T5018 – Subcontractor Income

3. Self Employment / Business Income

- Sales summaries
- Expense receipts (meals, phone, vehicle, supplies)
- Home office expenses

4. Deductions

- RRSP contribution slips
- Union dues
- Child care receipts
- Moving expenses
- Medical expenses

5. Credits

- Tuition (T2202)
- Disability tax credit (T2201)
- Transit passes
- Charitable donations

6. Rental Property

- Rental income summary
- Mortgage interest
- Property taxes & utilities
- Repairs & maintenance receipts

Need help filing? Prismledger Accounting Services can take care of your tax return.