

2012 Personal Income Tax Checklist

Use this checklist to assist you in gathering your personal tax documents for preparation of your personal tax return. Supplementary checklists or summaries are also available where indicated. All of our checklists and summaries are available on our website at www.mti-cga.com/resources/personal.

Name: _____

Personal Income & General Information

- Province of residence on December 31, 2012
- Spouse/partner's 2012 income, SIN, date of birth (if spouse/partner's return not prepared by our office)
- Changes in family circumstance such as births, deaths, marriages, reaching the age of 19 years, and becoming or ceasing to be a resident in Canada
- 2011 Assessment Notices and any correspondence from Canada Revenue Agency (CRA), including receipts for 2012 income tax installments or, payments of tax and any other 2012 Personal Tax Information which CRA may have sent you
- Salaries and employment Income – T4, T4A
- Other employment benefits or income (tips, stock option plans and Election Form T1212, etc.)
- Old Age Security and Canada Pension Plan benefits – T4A(OAS), T4A(P)
- Other pensions or superannuation – T4A (including foreign pensions)
- RRSP income – T4RSP
- RRIF income – T4RIF
- Employment Insurance – T4E
- Universal Child Care benefits – RC62
- WCB / Social Services benefits – T5007
- RRSP Home Buyers Plan & Lifelong Learning Plan (withdrawals & repayments) – T1137
- Details regarding contributions and withdrawals from Registered Education Savings Plans
- Retirement income – T4RCA

Investment Income

- Interest and dividends – T3, T5, T4PS
- Statement of Security Transactions T5008
- Capital gains and losses (full details required)
- December 31, 2012 statements for all investment accounts
- Interest on tax refund (Notice of Assessment)
- Canada Savings Bonds – T600, T5
- Income from mutual funds – T3
- Foreign income
- Annuities – T4A
- Rental income (full details required – Rental Income Summary worksheet is available)
- Limited partnership income – T5013
- Royalties

Other Income

- Spousal support and/or taxable child support received (details / court order)
- Scholarships/Bursaries – T4A
- Other – specify

Business Income

- Self-employed earnings information (full details required – Self-Employment Summary available)
- Partnership earnings information (full details required – Self-Employment Summary available)
- Farming / Fishing earnings information

Other Deductions

- RRSP receipts (include contributions to February 28, 2013)
- Non-deducted RRSPs carried forward
- Union / Professional dues
- Spousal support and/or deductible child support paid (details / court order)
- Child care expenses (Child Related Tax Credits & Deductions Checklist available)
- Safety deposit box charges
- Interest on money borrowed to purchase investments
- Interest paid on student loans
- Investment counsel and accounting fees
- Employee expenses (full details & T2200 required – Employment Expenses Summary available)
- Losses carried forward
- Deductible legal fees (fees to collect income)
- Claim for board & lodging expenses (TL2)
- Moving expenses including costs of maintaining a vacant former residence (full details required)
- Clergy Residence Deduction (T1223)
- Northern Residents Deduction
- Employment Insurance repayments

Non-Refundable Credits

- Tuition fees / Education credit for self or child (child's net income required) – T2202
- Disability Tax Credit for you and your dependents (Medical, Disability & Elderly Support Checklist available) – T2201
- Medical receipts for you and your dependents (Medical, Disability & Elderly Support Checklist available)
- Public transit passes (Monthly Pass and U-Pass only)
- Charitable donations & unused donations carried forward
- Children's fitness / arts expenses (Child Related Tax Credits & Deductions Checklist available)
- Political contribution receipts
- Tax credits for other dependents or when caring for others (Medical, Disability & Elderly Support Checklist worksheet available)
- First time-home buyer in 2012