

**To help you gather your information for preparation of your T1 Personal Tax Return, we have prepared the following list of possible information you might need to collect.**

| <b>Information slips:</b> |  |                          |
|---------------------------|--|--------------------------|
| T3                        | Trust Income                             | <input type="checkbox"/> |
| T4                        | Employment Income                        | <input type="checkbox"/> |
| T4A(OAS)                  | Old Age Security                         | <input type="checkbox"/> |
| T4A(P)                    | Canada Pension Plan                      | <input type="checkbox"/> |
| T4A                       | Other Pensions/Self-Employed Commissions | <input type="checkbox"/> |
| T4E                       | Employment Insurance & Other Benefits    | <input type="checkbox"/> |
| T4PS                      | Employee Profit Sharing Plan             | <input type="checkbox"/> |
| T4RIF                     | Income from Retirement Income Fund       | <input type="checkbox"/> |
| T4RSP                     | Income from Retirement Savings Plan      | <input type="checkbox"/> |
| T5                        | Investment Income                        | <input type="checkbox"/> |
| T10                       | Pension Adjustment Reversal              | <input type="checkbox"/> |
| T101                      | Resource Expenses                        | <input type="checkbox"/> |
| T5003                     | Tax Shelter Information                  | <input type="checkbox"/> |
| T5007                     | Benefits                                 | <input type="checkbox"/> |
| T5008                     | Securities Transactions                  | <input type="checkbox"/> |
| T5013                     | Partnership Income                       | <input type="checkbox"/> |
| T5018                     | Contractor Payments                      | <input type="checkbox"/> |
| RC62                      | Canada Child Benefit (CCB)               | <input type="checkbox"/> |

| <b>Details and receipts for:</b>   |  |                          |
|--|--|--------------------------|
| • Registered Retirement Savings Plan (RRSP) contributions  |  | <input type="checkbox"/> |
| • RRSP – Home Buyer’s Plan repayments  |  | <input type="checkbox"/> |
| • RRSP – Lifelong Learning Plan repayments   |  | <input type="checkbox"/> |
| • Registered Education Savings Plan (RESP) withdrawals   |  | <input type="checkbox"/> |
| • professional and union dues  |  | <input type="checkbox"/> |
| • charitable donations   |  | <input type="checkbox"/> |
| • tuition fees for both full-time and part-time courses for you or a dependant – Forms T2202, TL11A, B, C and D where applicable |  | <input type="checkbox"/> |
| • medical expenses for you and dependant(s) including travel expenses, medical premiums  |  | <input type="checkbox"/> |
| • political contributions  |  | <input type="checkbox"/> |
| • interest paid on qualifying student loans  |  | <input type="checkbox"/> |
| • moving expenses, including costs of maintaining a vacant former residence  |  | <input type="checkbox"/> |
| • home accessibility renovation receipts   |  | <input type="checkbox"/> |
| • childcare expenses   |  | <input type="checkbox"/> |

| <b>Rental properties</b>       |  |                          |
|--------------------------------|--|--------------------------|
| • property income              |  | <input type="checkbox"/> |
| • expenses & capital purchases |  | <input type="checkbox"/> |

| <b>Details and receipts for Business/Farming/Professional Income/Expense:</b>   |                          |
|---|--------------------------|
| • revenue & expenses  | <input type="checkbox"/> |
| • capital purchases (vehicle, equipment, etc.)  | <input type="checkbox"/> |
| • home office expenses  | <input type="checkbox"/> |
| • vehicle expenses including business mileage   | <input type="checkbox"/> |
| Do you have <b>Internet Business Activities?</b> Include any activity where you earn income from your webpages, websites, or through an online platform | <input type="checkbox"/> |

| <b>Details of other income/expense, such as:</b>   |                          |
|--|--------------------------|
| • capital gains and losses realized in 2024 (This information may be obtained from your investment advisor.)   | <input type="checkbox"/> |
| • details on the disposition of your principal residence (proceeds of disposition, cost of property, description of property and year property was acquired)                           | <input type="checkbox"/> |
| • alimony, separation allowances, child maintenance (including divorce agreement and support amount that was paid)<br>Income <input type="checkbox"/> Expense <input type="checkbox"/> | <input type="checkbox"/> |
| • pensions (certain pension income may be split between spouses). Foreign pension income has special rules.  | <input type="checkbox"/> |
| • other investment income, including Bitcoin   | <input type="checkbox"/> |
| • tips, prizes, awards received  | <input type="checkbox"/> |
| • interest on money borrowed to purchase investments   | <input type="checkbox"/> |
| • investment counsel fees  | <input type="checkbox"/> |
| • accounting, legal and other professional fees  | <input type="checkbox"/> |
| • other employment income (including stock option plans and Election Form T1212)   | <input type="checkbox"/> |
| • director fees  | <input type="checkbox"/> |
| • scholarships, fellowships, bursaries   | <input type="checkbox"/> |
| • adoption related expenses  | <input type="checkbox"/> |
| • clergy residence deduction information, including Form T1223   | <input type="checkbox"/> |
| • disability supports expenses (speech, sight, hearing, learning aids for impaired individuals and attendant care expenses)  | <input type="checkbox"/> |
| • Digital News subscription receipt  | <input type="checkbox"/> |

| <b>Employment Expenses</b>   |                          |
|--|--------------------------|
| • employment related expenses – <b>provide a T2200</b> – Declarations of Conditions of Employment (signed by employer) | <input type="checkbox"/> |
| • tools acquired by tradespersons and eligible apprentice mechanics  | <input type="checkbox"/> |
| • capital purchases (vehicle, equipment, etc.)   | <input type="checkbox"/> |
| • home office expenses   | <input type="checkbox"/> |
| • vehicle expenses including employment mileage  | <input type="checkbox"/> |