

PERSONAL TAX RETURN (T1)

Gather these *before you file.*

Tick each slip, receipt and document as you collect it, then bring this list to your appointment or send everything to us together.

Name _____

Tax year _____

Date _____

01 Slips

10 items

☐ T4 – employment income

☐ T4A(P) – CPP or QPP benefits

☐ T3 – trust income

☐ T4A – pension, retirement, annuity and other income

☐ T4E – Employment Insurance benefits

☐ T5008 – securities transactions

☐ T4A(OAS) – Old Age Security

☐ T5 – investment income

☐ T4RSP – RRSP income

☐ T4RIF – RRIF income

02 Receipts

20 items

☐ RRSP contributions

☐ Moving expenses

☐ Home accessibility expenses

☐ FHSA contributions

☐ Home office expenses (T2200 from employer)

☐ Rent or property tax (Ontario Trillium Benefit)

☐ Charitable donations

☐ Disability supports

☐ Eligible educator school supplies

☐ Medical and dental expenses

☐ Political contributions

☐ Employment expenses (vehicle, tools)

☐ Child care expenses

☐ Investment counsel and carrying charges

☐ Digital news subscriptions

☐ Tuition (T2202)

☐ Support payments made

☐ Childcare or camp receipts for children

☐ Student loan interest

☐ Union and professional dues

03 Other documents

13 items

☐ Last year's Notice of Assessment

☐ Spouse's net income

☐ Foreign property over \$100,000 (T1135)

☐ SIN for you, your spouse and dependants

☐ Rental income and expenses

☐ Capital gains and losses records

☐ Direct deposit banking details

☐ Self-employment income and expenses

☐ Home purchase or sale details

☐ Dependants' names and dates of birth

☐ Vehicle logbook

☐ Tax instalments paid

☐ Letters from the CRA

04 Notes and questions for us

Ready to file?

Book a consultation online or at our Richmond Hill office.

narainandco.com
+1 (416) 644-0697
info@narainpc.com