Personal Tax Preparation Checklist

1. Personal Information:

- ☑ Social Insurance Numbers (SIN) for you, your spouse, and any dependents (if applicable).
- ☑ Dates of birth for all family members.

2. Income Slips:

Depending on the type of income, gather the following forms:

Employment Income:

- ☑ T4 Statement of Remuneration Paid (for employment income).
- ☑ RL-1 Employment and Other Income (for Quebec residents).

Self-Employment Income:

- ☑ T2125 Statement of Business or Professional Activities (for self-employed individuals).
- ☑ T4002 Statement of Commission Income (if applicable).

Partnership Income:

- ☑ T5013 Statement of Partnership Income (if you're part of a partnership).

Investment Income:

- ☑ T5 Statement of Investment Income (for interest, dividends, and other investment income).
- ☑ T3 Statement of Trust Income (if applicable).

Retirement Income:

- ☑ T4A Statement of Pension, Retirement, Annuity, and Other Income.
- ☑ T4A (P) Statement of Canada Pension Plan Benefits.
- ☑ T4A (OAS) Statement of Old Age Security.
- ☑ T4RSP Statement of RRSP Income.
- ☑ T4RIF Statement of income from a Registered Retirement Income Fund.

Social Benefits and Employment Insurance:

- ☑ T4E Statement of Employment Insurance and Other Benefits.
- ☑ T5007 Statement of Benefits (Workers' Compensation or Social Assistance benefits).

3. Other Relevant Documents:

- ☑ Notice of Assessments from last year's tax return.
- ☑ NETFILE access code (if filing online).
- ☑ Any supporting documents such as receipts, invoices (if self-employed), and other relevant paperwork.

4. CRA My Account:

- ☑ Sign up for CRA My Account to streamline the tax filing process and ensure accuracy.

5. Additional Considerations:

- ☑ Quebec residents should also have RL-1 forms for employment income.
- ☑ Keep track of all expenses during the tax year to support deductions.