
T1 FINAL TAX RETURN CHECKLIST

Name:

Phone:

Email:

We want to make sure the final return and trust return are done properly. Please use this list as a guideline for tax information you may have received.

Mailing Address:

Marital Status:

DOB:

SIN:

CRA Documents & Income Slips

Previous Year Notice of Assessment
T4 Slips & Other Employment Information
T4A(OAS), T4AP, T4A, T4RSP, T4RIF
T3, T5, T5013, T5007, T5008
RL Slips for Quebec Residents
T4AP Death Benefit (\$2,500)
T4E Employment Insurance Benefits
RRSP Contribution slips
Foreign (eg. US Soc. Sec. UK pension)

Other Documents

Death Certificate
The Last Will
Capital Gains/Losses Documents
(sales of stocks, bonds or real estate)
Principle Residence Deem to Sales Report
Statement if applicable
Self-employment Checklist
Rental - Income & Expenses
Tax Installment Payments

Receipts & Deductions

**Federal & Ontario Healthy Home
Improvement Tax Credit Receipts**
**Property Tax/Rent Receipts with the
approval of payment**
Spousal Support
Childcare expenses
Professional Fees or/Union Dues
Senior Bus Passes for Ontario residents
Interest paid on investment loan
Carrying Charges
Charitable/Political Receipts
Medical Expense Receipts (Up to 2 years)

- Medical Insurance Premiums (Incl. Travel Insur. Medical Portion)
- Medical Expense Receipts
- Medical Summaries from Insurance Co. (Detailed Summaries)
- Prescriptions (Detailed Summary)
- Nursing/Retirement Home

Annual Statement

NOTES/THING YOU WANT US TO KNOW