

**2023 Tax Year  
Personal Income Tax Checklist  
Admin Advantage Ltd.**

**Please use the checklist below to make sure you have included all of the documents for your taxes:**

<ul style="list-style-type: none"> <li>✓ <b>CRA Assessments:</b> <ul style="list-style-type: none"> <li>○ Last year's Notice of Assessment (NOA NOT REQUIRED)</li> <li>○ Instalment Payments</li> </ul> </li>   <li>✓ <b>Employment Income:</b> <ul style="list-style-type: none"> <li>○ T4</li> <li>○ T4A</li> <li>○ T4PS</li> </ul> </li>   <li>✓ <b>Employment Expenses:</b> <ul style="list-style-type: none"> <li>○ T2200 plus a list of the expenses</li> </ul> </li>   <li>✓ <b>Pension Income:</b> <ul style="list-style-type: none"> <li>○ T4A</li> <li>○ T4AOAS</li> <li>○ T4AP</li> <li>○ T4RIF</li> <li>○ T4RSP</li> </ul> </li>   <li>✓ <b>Investment Income:</b> <ul style="list-style-type: none"> <li>○ T3</li> <li>○ T5</li> <li>○ T5008</li> <li>○ T5013</li> </ul> </li>   <li>✓ <b>Capital Gains:</b> <ul style="list-style-type: none"> <li>○ T5013</li> <li>○ Trading summaries from Brokers</li> <li>○ Annual statement from Mutual Funds</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>✓ <b>Other Income:</b> <ul style="list-style-type: none"> <li>○ Rental income and expense information</li> <li>○ Self-Employment income and expense information (CPP contributions / EI premiums)</li> <li>○ COVID-19 benefits</li> </ul> </li>   <li>✓ <b>Deductions and Credits:</b> <ul style="list-style-type: none"> <li>○ RRSP (must be official receipts)</li> <li>○ FHSA (First Home Savings Account)</li> <li>○ Child care receipts</li> <li>○ Adoption expenses</li> <li>○ Support payment information</li> <li>○ Disability support deduction</li> <li>○ Caregiver/disability amount</li> <li>○ Moving expenses</li> <li>○ Tuition fees – T2202/2202A</li> <li>○ Student Loan Interest slips</li> <li>○ Union/Professional dues</li> <li>○ Labour sponsored funds – T5006/EVCC30</li> <li>○ New Home Buyers</li> <li>○ Investment advisory fees</li> <li>○ Interest on investment loans</li> <li>○ Donations (must be official receipts)</li> <li>○ Instalment payment information</li> <li>○ Medical/Dental/Optical receipts (less any reimbursements from Insurance)</li> <li>○ Premiums paid to Private/Travel Medical Insurance plans</li> </ul> </li> </ul>
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