Personal T1 Clients
(Employees, retirees, investors, non-business landlords)

Please use the checklist that matches how you earn your income. Provide only the items that apply to you.

Claims related to vehicles, home offices, and asset purchases are subject to increased review. Complete records help us support your filing and avoid reassessments.

1. Personal Information

- ☐ Social Insurance Number (SIN)
- ☐ Date of birth
- ☐ Current address
- ☐ Marital status (note if it changed during the year)
- ☐ Spouse or common-law partner information
- ☐ Dependant details (names, SINs, dates of birth)
- ☐ Prior-year Notice of Assessment or Reassessment
- ☐ CRA correspondence received during the year

2. Income Slips & Benefits

- ☐ T4 – Employment income
- ☐ T4A / T4E – EI or other income
- ☐ T4A-OAS / T4A-P – Old Age Security and CPP
- ☐ Union or professional dues (if not included on T4)
- ☐ Repayments of COVID-19 benefits (if applicable)

3. Investments & Property

- ☐ T3 / T5 / T5008 investment slips
- ☐ Capital gains or losses
- ☐ Sale of principal residence (purchase and sale dates)
- ☐ Cryptocurrency transaction summaries
- ☐ Foreign investment income
- ☐ Carrying charges and interest expenses
- ☐ Rental property information (if applicable)

  If you have multiple properties, please provide for each property.

  - ☐ Property address and ownership % (if co-owned)
  - ☐ Rental income received
  - ☐ Rental expenses - Mortgage interest only (principal portion not deductible), Property taxes, Insurance, Repairs & maintenance, Utilities (if paid by landlord)

4. Registered Plans

- ☐ RRSP contribution receipts (including first 60 days of following year)
- ☐ RRSP deduction limit (from prior Notice of Assessment)
- ☐ T4RSP / T4RIF withdrawal slips
- ☐ T4FHSA – First Home Savings Account statements

5. Deductions & Tax Credits

- ☐ Medical expense receipts
- ☐ Charitable donation receipts
- ☐ Childcare expenses
- ☐ Tuition receipts (T2202)
- ☐ Student loan interest
- ☐ Support payments paid or received
- ☐ Disability Tax Credit certificate
- ☐ Moving expenses (if applicable)
- ☐ Multigenerational Home Renovation Tax Credit (MHRTC)
- ☐ Home Buyers' Amount
- ☐ Home accessibility or renovation credits
- ☐ Political contribution receipts

6. Family & Life Events

- ☐ Marriage, separation, or divorce details
- ☐ New dependants
- ☐ Caregiver or attendant care expenses
- ☐ Adoption expenses

7. Compliance & Reporting

- ☐ Foreign property details (Form T1135, if applicable)
- ☐ Trust reporting information
- ☐ Instalment payment confirmations

8. Final Review Items

- ☐ Sale of major assets
- ☐ Lump-sum payments or income anomalies
- ☐ CRA letters or reviews during the year

C&P Partners CPA 4 Court Street N, Milton, ON L9T 2S1
Tel 905 878 7338 | Fax 905 878 8304 | Email welcome@cppartners.ca
www.cppartners.ca