

Personal tax return checklist

What to gather before your T1 personal return is prepared. Most people need the first two sections only. Bring what applies to you; if you are not sure whether something matters, bring it anyway. Slips for the 2026 tax year are issued by the end of February 2027. Most are also available in CRA My Account once the issuer has filed them.

01 ABOUT YOU

- ☐ Social insurance numbers and dates of birth for you, your spouse or partner, and any dependants
- ☐ Current address, and the date of any move during the year
- ☐ Change in marital status during the year, with the date
- ☐ Last year's notice of assessment or reassessment from the CRA
- ☐ Direct deposit details if they have changed, or if you want a refund deposited
- ☐ If you became a resident of Canada during the year: date of arrival and income earned before arriving
- ☐ Any letter received from the CRA during the year

02 INCOME SLIPS

- ☐ T4 employment income, one from each employer
- ☐ T4A pensions, commissions, self-employed commissions, scholarships and other income
- ☐ T4A(P) Canada Pension Plan and T4A(OAS) Old Age Security
- ☐ T4E employment insurance benefits
- ☐ T4RSP and T4RIF withdrawals from registered plans
- ☐ T4FHSA first home savings account
- ☐ T5 investment income and T3 trust or mutual fund income
- ☐ T5008 securities transactions, with your purchase cost for each sale
- ☐ T5013 partnership income
- ☐ T5007 workers' compensation or social assistance
- ☐ Foreign income statements, pensions or dividends, in the original currency with dates
- ☐ Records of tips, gratuities, casual earnings or income with no slip

03 DEDUCTIONS AND CREDITS

- ☐ RRSP contribution receipts, including contributions made in the first 60 days of 2027
- ☐ Union or professional dues not shown on a T4
- ☐ Child care receipts showing the provider's name and social insurance number or business number
- ☐ Medical expenses for the family: receipts, prescriptions, dental, glasses, private health premiums, travel for treatment
- ☐ Charitable donation receipts
- ☐ T2202 tuition certificate, and student loan interest statements
- ☐ Spousal or child support paid or received, with the agreement or court order
- ☐ Moving expenses if you moved at least 40 kilometres closer to a new job or school
- ☐ Form T2200 from your employer if you claim employment expenses, with the receipts
- ☐ Disability tax credit approval letter, if newly approved
- ☐ Digital news subscription receipts
- ☐ Home buyers' amount: closing statement for a first home bought in the year

04 SELF-EMPLOYMENT AND RENTAL

- ☐ Business income and expense summary for the year, with bank and credit card statements if the books are not kept elsewhere
- ☐ HST/GST registration number and copies of returns filed during the year
- ☐ Vehicle log: total kilometres and business kilometres, plus fuel, insurance, repairs, lease or loan interest
- ☐ Home office details: total area, area used for work, and the year's rent or mortgage interest, utilities, insurance and property tax
- ☐ Equipment or vehicles bought or sold in the year, with dates and amounts
- ☐ Rental property: address, rent received, expenses by category, and details of any repairs or improvements
- ☐ Statements for any mortgage on a rental property
- ☐ Subcontractor payments and any T4A or T5018 slips you issued

05 PROPERTY AND INVESTMENTS

- ☐ Sale of your home: address, year purchased, sale price and closing costs. Every principal residence sale must be reported, even when no tax is owed
- ☐ Sale of other property or investments: purchase and sale documents, and the cost of any improvements
- ☐ Cryptocurrency transaction history from each exchange or wallet
- ☐ Foreign property with a total cost over CAD 100,000 at any point in the year: statements showing cost and income, for form T1135
- ☐ Investment counsel or management fees paid outside a registered plan
- ☐ Interest paid on money borrowed to invest

06 ONTARIO

- ☐ Rent paid in 2026 and the landlord's name, or property tax paid on your home, for the Ontario Trillium Benefit
- ☐ Amounts paid to a long-term care home or for energy costs on a reserve, if applicable
- ☐ Instalment payments made to the CRA during the year, with dates

This list covers common situations and is not exhaustive. If your circumstances changed in the year, tell us. Prepared by Mansel Financial, Greater Toronto Area. Not advice for any particular situation. Sources: Canada Revenue Agency and Ontario.ca, linked on the web version.

manselfinancial.com/resources/personal-tax-checklist