

## ONTARIO PERSONAL TAX PREPARATION CHECKLIST (WITH DEPENDENT CHILDREN)

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### PERSONAL INFORMATION

- SIN (you + children)
- Dates of birth (all)
- Current address & marital status
- Banking info (direct deposit)

### INCOME (T-SLIPS)

- T4 – Employment income
- T4A – Other income / self-employment
- T5 / T3 – Investment income
- T4E – Employment Insurance
- T5007 – Benefits / assistance
- Other income (rental, side work)

### CHILD & FAMILY INFORMATION

- Child care receipts (daycare, camps, babysitting)
- Custody documentation (if applicable)
- Disability documents (if claiming credits)

### EDUCATION

- Tuition slips (T2202)
- Student loan interest

### HOUSING (ONTARIO CREDITS)

- Rent receipts OR property tax statement
- Utility costs (if applicable)

### MEDICAL EXPENSES

- Prescriptions, dental, vision
- Insurance premiums
- Travel for medical care

### DEDUCTIONS & CREDITS

- RRSP contributions
- Union/professional dues
- Charitable donations
- Moving expenses
- Work-from-home expenses

### FAMILY TAX BENEFITS

- Child care expense deduction

- Eligible dependant credit (if single parent)
- Canada caregiver credit (if applicable)

#### FILING

- CRA My Account access
- Last Notice of Assessment
- Tax software ready
- Auto-fill My Return (optional)

#### ✓ FINAL CHECK

- All slips entered correctly
- SINs & personal info verified
- Credits maximized (Ontario + federal)
- Return reviewed before submitting

#### AFTER FILING

- Save/download return copy
- Review Notice of Assessment
- Keep documents (6 years)

TIP: Claim child care expenses under the lower-income spouse (if applicable) to maximize sav