

Canadian Tax Checklist

Before you start working on your tax return, you'll need to gather a few things. To make sure you get every tax credit and deduction you're entitled to, we've prepared this handy checklist for you.

Here's a handy checklist:

Tax Slips

<input type="checkbox"/> T4 Slip (Employment Income)	<input type="checkbox"/> RC62 (Universal Child Care Benefit)
<input type="checkbox"/> T4E Employment insurant benefits	<input type="checkbox"/> T5007 (Social assistance payments/Worker's compensation benefits)
<input type="checkbox"/> T4A (Other pensions & annuities & certain scholarships)	
<input type="checkbox"/> T4AP (CPP benefits)	<input type="checkbox"/> T2202A (Tuition/ education receipts)
<input type="checkbox"/> T4 RSP (RRSP income)	<input type="checkbox"/> T5031 (Partnership income)
<input type="checkbox"/> T4 RIF (RRIF income)	<input type="checkbox"/> T2200 (Condition of employment / allowable employment expenses)
<input type="checkbox"/> T4 A-OAS (Old Age Security)	
<input type="checkbox"/> T3 (Mutual funds, REITS, ETFs)	<input type="checkbox"/> All other information slips
<input type="checkbox"/> T5 (Investment income – interest, dividends, certain capital gains)	<input type="checkbox"/> _____

Receipts

<input type="checkbox"/> RRSP contribution slips	<input type="checkbox"/> Political contributions
<input type="checkbox"/> Medical expenses	<input type="checkbox"/> Child care expenses
<input type="checkbox"/> Support for a child, spouse or common-law partner	<input type="checkbox"/> Adoption expenses
<input type="checkbox"/> Transit pass receipts	<input type="checkbox"/> Children's arts and sports programs
<input type="checkbox"/> Charitable donations	<input type="checkbox"/> Tool expenses (tradespersons)
<input type="checkbox"/> Office-in-home expenses	<input type="checkbox"/> Interest paid on your student loans
<input type="checkbox"/> Moving expenses (including realtor's commissions)	<input type="checkbox"/> Receipt for your rent/property tax (certain provinces only)
<input type="checkbox"/> Exams for professional certification	<input type="checkbox"/> Professional or union dues
<input type="checkbox"/> Carrying charges and interest expenses	<input type="checkbox"/> Attendant expenses for a disabled person
<input type="checkbox"/> Other interest expenses	<input type="checkbox"/> _____

Other Documentation		
<input type="checkbox"/> Notice of Assessment/Reassessment		<input type="checkbox"/> Commissioned employee expenses
<input type="checkbox"/> Canada Revenue Agency correspondence		<input type="checkbox"/> Automobile / Travel logbook and expenses (self-employed people & commissioned employees)
<input type="checkbox"/> Amounts you have paid in tax instalments		
<input type="checkbox"/> Rental income & expenses		<input type="checkbox"/> Declaration of Conditions of Employment (T2200)
<input type="checkbox"/> Sale or deemed sale of stocks, bonds, real-estate, etc.		<input type="checkbox"/> Volunteer firefighters certification
<input type="checkbox"/> Disability tax credit certificate		<input type="checkbox"/> Graduate retention certificate (SK only)
<input type="checkbox"/> Business, farm or fishing income or expenses		<input type="checkbox"/> Search and Rescue volunteers certification
<input type="checkbox"/> Northern residents deductions receipts		<input type="checkbox"/> Custody arrangement documentation
<input type="checkbox"/> Income/expenses		<input type="checkbox"/> Legal expenses to collect alimony, pension or retiring allowances.
<input type="checkbox"/> _____		<input type="checkbox"/> _____



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