



# 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

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

### Receipts

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



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## 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"/> Commissioned employee expenses   |
| <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"/> _____  |
| <input type="checkbox"/> Legal expenses to collect alimony, pension or retiring allowances. | <input type="checkbox"/> _____  |
| <input type="checkbox"/> _____  |   |



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