

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 (RRSP income)
- T4 RIF (RRIF income)
- T4 A-OAS (Old Age Security)
- T3 (Mutual funds, REITS, ETFs)
- T5 (Investment income – interest, dividends, certain capital gains)
- RC62 (Universal Child Care Benefit)
- T5007 (Social assistance payments/Worker's compensation benefits)
- T2202A (Tuition/ education receipts)
- T5031 (Partnership income)
- T2200 (Condition of employment / allowable employment expenses)
- All other information slips
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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

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