

Tax return checklist

What do you need to file your taxes? Whether you prepare your tax return yourself, or have an accountant or tax specialist do it for you, use this checklist to make sure that you collect all relevant information.

Tax slips

Here are the federal tax slips you may receive (Quebec residents will also receive RL slips). Most will arrive by the end of February.

- ☐ T3 – Allocations or distributions from trusts (including segregated funds, mutual funds and exchange-traded funds)
- ☐ T4 – Employment income
- ☐ T4RSP – Registered Retirement Savings Plan (RRSP) income
- ☐ T4RIF – Registered Retirement Income Fund (RRIF) income
- ☐ T4A – pension, retirement, annuity, and other income (including registered education savings plan payments and self-employed commissions)
- ☐ T4A (OAS) – Old Age Security pension benefits
- ☐ T4A (P) – Canada Pension Plan benefits
- ☐ T4E – Employment Insurance benefits
- ☐ T5 – investment income, including distributions from corporate-class mutual funds and interest received from bank accounts
- ☐ T5007 – Workers' compensation/social assistance benefits
- ☐ T5008 – Statement of Securities Transactions
- ☐ T5013 – Partnership income
- ☐ T101 – Resource expenses

General information

Historical information received from the Canada Revenue Agency (CRA) and Revenu Quebec for Quebec residents, contain important information to help you accurately file this year's tax return.

- ☐ Previous year's tax return
- ☐ Previous year's Notice of Assessment
- ☐ Tax installment payments
- ☐ Any reassessments and other correspondence

Deductions and credits

Deductions and credits can significantly reduce your tax bill. To support your claims, collect your receipts for:

- ☐ RRSP contributions
- ☐ Investment expenses
- ☐ Investment loan expenses
- ☐ Moving expenses
- ☐ Medical expenses
- ☐ Charitable donations
- ☐ Political donations
- ☐ Child care expenses
- ☐ Adoption expenses
- ☐ Child support and alimony payments
- ☐ Tuition or examination fees
- ☐ Student loan interest
- ☐ Professional and union dues
- ☐ Car/travel logbook and expenses
- ☐ Rent/property tax (in certain provinces)
- ☐ Home office expenses

Carry forward amounts

These are deductions and credits you decided to carry forward to use in future years.

- ☐ RRSP contributions
- ☐ Moving expenses
- ☐ Charitable donations
- ☐ Tuition amounts
- ☐ Student loan interest
- ☐ Capital losses

Other considerations

You may need to provide additional information if you answer “yes” to any of the following:

- ☐ Did your marital status change?
- ☐ Do you support a spouse or common-law partner, or a dependant with a physical or mental impairment?
- ☐ Did you sell stocks, bonds or real estate (including your principal residence)?
- ☐ Do you have business income/expenses?
- ☐ Do you work on commission?
- ☐ Do you have a home office?
- ☐ Do you have farm or fishing income/expenses?
- ☐ Do you have rental income/expenses?
- ☐ Are you a volunteer firefighter?
- ☐ Are you eligible for the Disability Tax Credit?
- ☐ Are you a Northern resident?
- ☐ Did you hold more than \$100,000 CAD of specified foreign property at any time during the year (including bank accounts, shares, or real property)?



This checklist isn't intended to be a complete list of all the possible documentation that you may need. It's a good idea to seek the advice of a professional to ensure you have the information and documentation appropriate to your specific situation.