

Tax Return Checklist

Whether you complete your tax return independently or engage an accountant or tax professional, please refer to this checklist to help ensure all pertinent personal information is gathered.

Tax Slips	Deductions & Credits	Other Information & Considerations	Other situations
<input type="checkbox"/> T3 – Allocations or distributions from trusts (including segregated funds, mutual funds and exchange-traded funds)	<input type="checkbox"/> RRSP contributions	<input type="checkbox"/> Previous tax return	<input type="checkbox"/> Marital status changed during the year
<input type="checkbox"/> T4 – Employment income	<input type="checkbox"/> Investment expenses	<input type="checkbox"/> Notice of Assessment	<input type="checkbox"/> Supported a spouse/partner or a dependant with a disability
<input type="checkbox"/> T4RSP – RRSP income	<input type="checkbox"/> Investment loan interest	<input type="checkbox"/> Tax instalment payments	<input type="checkbox"/> Sold any stocks, bonds, or real estate (including your home)
<input type="checkbox"/> T4RIF – RRIF income	<input type="checkbox"/> Moving expenses	<input type="checkbox"/> Any CRA correspondence	<input type="checkbox"/> Had business income or business expenses
<input type="checkbox"/> T4A – pension, retirement, annuity, and other income (including registered education savings plan payments and self-employed commissions)	<input type="checkbox"/> Medical expenses	<input type="checkbox"/> RRSP carryforwards	<input type="checkbox"/> Earned commission income
<input type="checkbox"/> T4A (OAS)	<input type="checkbox"/> Charitable donations	<input type="checkbox"/> Charitable carryforwards	<input type="checkbox"/> Worked from home and may claim home office expenses
<input type="checkbox"/> T4A (P) – CPP benefits	<input type="checkbox"/> Political donations	<input type="checkbox"/> Tuition amounts , student loan interest	<input type="checkbox"/> Had farm or fishing income or expenses
<input type="checkbox"/> T4E – Employment Insurance	<input type="checkbox"/> Child care expenses	<input type="checkbox"/> Capital Gains, Capital losses – current year or carry forward or carry back amounts	<input type="checkbox"/> Had rental income or rental expenses
<input type="checkbox"/> T5 – investment income, including distributions from corporate-class mutual funds and interest received from bank accounts	<input type="checkbox"/> Adoption expenses	<input type="checkbox"/> Moving expenses	<input type="checkbox"/> Served as a volunteer firefighter
<input type="checkbox"/> T5007 – Workers’ comp/social assistance	<input type="checkbox"/> Child support/alimony paid	<input type="checkbox"/> Sale of stocks or real estate	<input type="checkbox"/> May qualify for the Disability Tax Credit
<input type="checkbox"/> T5008 – Securities transactions	<input type="checkbox"/> Tuition fees and student loan interest	<input type="checkbox"/> Business/commission income	<input type="checkbox"/> Lived in a northern or remote area
<input type="checkbox"/> T5013 – Partnership income	<input type="checkbox"/> Home accessibility	<input type="checkbox"/> Home office	<input type="checkbox"/> Owned foreign property or accounts worth more than \$100,000 CAD
<input type="checkbox"/> T101 – Resource expenses	<input type="checkbox"/> Professional/union dues		
	<input type="checkbox"/> SASK home renovation		

This checklist is not designed to be an exhaustive compilation of all documentation that may be required. Consulting a qualified professional is recommended to ensure you obtain the appropriate information and documents for your particular circumstances.

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