

Personal Income Tax Checklist

Slips

- T4 slips (Employment income)
- Old Age Security and CPP Benefits (T4A-OAS, T4A-P)
- Other pensions and annuities (T4A)
- Employment Insurance (T4E)
- Interest, dividends, mutual funds (T3, T5)
- Tuition/education receipts (T2202A)
- Universal Child care benefit (RC62)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- Rental Property/ Self-employment (income/ expenses, home office expenses)

Receipts

- RRSP contribution
- Support for a child, spouse or common-law partner
- Professional or Union dues
- Employment expenses (if applicable) i.e. T2200
- Medical expenses
- Transit pass receipts
- Charitable donations
- Political contributions
- Child care expenses

Receipts (Continued)

- Moving expenses (If applicable)
- Interest paid on student loans
- Interest expenses/Carrying charges
- Adoption expenses

Other Documentation

- Notice of Assessment/Reassessment
- CRA correspondence
- Sale or deemed sale of stocks, bonds, or real estate (T5008)
- Travel log showing business kilometers
- Disability Tax credit certificate (if new recipient)
- Custody Arrangement documentation
- Volunteer Firefighters' Certification
- Business, farm and fishing income/expenses
- Northern residents' deductions receipts.
- Tax installments paid throughout the year
- Other relevant receipts
- Death certificate (If applicable)
- Copies of wills, Power of Attorney or Executive (If applicable)

Please note, the Children's Arts and Sports credit has been discontinued.