

Canadian Tax Checklist

We want to make sure you get every tax credit and deduction you're entitled to. So, before you get started on your taxes, make sure you have all the receipts and income records you need.

Tax Slips

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- COVID-19 relief payments (T4A)
- Interest, dividends, mutual funds (T3, T5, T5008)
- T2202 Tuition and Enrollment Certificate
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- All other information slips

Receipts

- RRSP contribution receipts
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons & apprentice mechanics)
- Office-in-home expenses (if worked at home due to COVID)
- Other employment expenses
- Teacher's school supplies
- Medical expenses
- Home renovations (seniors and disabled)
- Charitable donations
- Political contributions

- Child care expenses
- Adoption expenses
- Moving expenses
- Interest paid on student loans
- Carrying charges and interest expenses
- Exams for professional certification
- Digital news subscription

Other documentation

- Notice of Assessment/Reassessment
- Canada Revenue Agency correspondence
- Sale of principal residence
- Sale or deemed sale of stocks, bonds or real estate
- Northern residents deductions receipts
- Automobile / Travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification
- Search and Rescue volunteers' certification
- Written certification for eligible educator school supplies

REMEMBER to tell your Tax preparer:

- If you have dependents
- If you are doing taxes for someone else
- If you prefer direct deposit or cheque