

Tax Checklist

We want to ensure we optimize your tax return so you get every tax credit and deduction you're entitled to.

Please consider the following list to help you compile the right documents.

RECEIPTS

1. RRSP contribution receipts ☐
2. First Home Savings Account (FHSA) contribution receipts ☐
3. T4FHSA Slip: First Home Savings Account Statement ☐
4. Support for a child, spouse or common-law partner ☐
5. Professional or union dues ☐
6. Tool expenses (Tradespersons & apprentice mechanics) ☐
7. Office-in-home expenses ☐
8. Other employment expenses ☐
9. Teacher's school supplies ☐
10. Medical expenses ☐
11. Home renovations (seniors and disabled) ☐
12. Multigenerational home renovation tax credit ☐
13. Charitable donations ☐
14. Political contributions ☐
15. Child care expenses ☐
16. Adoption expenses ☐
17. Moving expenses ☐
18. Interest paid on student loans ☐
19. Carrying charges and interest expenses ☐
20. Exams for professional certification ☐
21. Digital news subscription ☐
22. Labour Mobility Deduction for Tradespeople ☐

SLIPS

1. T4 slips (Employment income) ☐
2. Employment insurance benefits (T4A or T4E) ☐
3. COVID-19 relief repayments (T4A) ☐
4. Interest, dividends, mutual funds (T3, T5, T5008) ☐
5. T2202 Tuition and Enrollment Certificate ☐
6. Old Age Security and CPP benefits (T4A-OAS, T4AP) ☐
7. Other pensions and annuities (T4A) ☐
8. Social assistance payments (T5007) ☐
9. Workers' compensation benefits (T5007) ☐
10. Advance Canada Workers Benefit (CWB) payments (RC210) ☐
11. All other information slips ☐

OTHER DOCUMENTATION

1. Notice of Assessment/ Reassessment ☐
2. Canada Revenue Agency correspondence ☐
3. Sale of principal residence ☐
4. Sale or deemed sale of stocks, bonds or real estate ☐
5. Northern residents deductions receipts ☐
6. Rental income and expense receipts ☐
7. Business, farm or fishing income/expenses ☐
8. Automobile/Travel logbook and expenses ☐
9. Disability Tax Credit Certificate ☐
10. Declaration of Conditions of Employment (T2200) ☐
11. Volunteer Firefighters certification ☐
12. Search and Rescue volunteers certification ☐
13. Written certification for eligible educator school supplies ☐