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Tax Documents Checklist

Want to make sure you get every tax credit and deduction you're entitled to? Check out the handy list below to make sure you've compiled everything before coming in.

Slips	Receipts
T4 Slips (Employment Income)	RRSP contribution receipts
T4E – Employment Insurance Benefits	Child / spousal support payments / income
T3, T5, T5008 – Investment Income	Professional or union dues
T2202A – Tuition / Education Expenses	Tool expenses (tradespersons)
T4A(OAS), T4A(P) – Old Age Security and CPP Benefits	Medical / dental / massage / chiro / etc. expenses (summaries if available)
T4A – Other Pension Amounts	ITA transcript (apprentices)
T5007 – Social Assistance (WCB) Payments	Charitable donations
	Political contributions
Other Items	Childcare expenses
Notice of Assessment / Reassessment	Adoption expenses
Canada Revenue Agency correspondence	Seniors (over 65) renovation costs
Documents on sale of investments or real estate	Interest paid on student loan
Northern residents' deductions receipts	Carrying charges and interest for investments
Rental income and expense receipts or summary	Exams for professional certification
Small business income and expense receipt or summary	Home office costs (utilities, mortgage interest, property taxes, rent, cell phone, internet)
Automobile (Year, Make, Model)	Moving expenses (purchase and sale statement of adjustment, moving receipts)
Automobile mileage logbook (total and business)	
Declaration of conditions of employment (T2200)	
Separation / divorce agreement	
Tips from service positions (taxi driver, waiter)	
Prior years income tax return	

Did you know there are over 400 different deductions and credits in the Canadian tax system? If you are wondering if something can be included please ask!

What we don't need:

- MSP statements or summaries
- GST/HST Credit statements
- Statements of investment activities for your RRSPs, TFSA, RRIFs, or RESPs
- School activity or busing fees for your children

* Working with you to ease the burden and confusion of taxation reporting *