

## Tax Documents Checklist

### Income

- ☐ T4 – Employment Income
- ☐ T4A - Pension and scholarships income
- ☐ T4A(P) – Canada Pension income
- ☐ T4A(OAS) - Old Age Security benefits
- ☐ T4E - Employment Insurance benefits
- ☐ T4RIF - RRIF withdrawals
- ☐ T4RSP - RRSP withdrawals
- ☐ T3, T5, T5008, T5013 - Interest, dividends, capital gains, investment income and capital gains and investment income for stocks/bonds/mutual funds
- ☐ T5007 - Social assistance received and Worker's compensation benefits
- ☐ T4PS - Employee profit sharing and stock options exercised
- ☐ Foreign Income details
- ☐ Foreign Pension Income
- ☐ RC210, ... any other income related documents

### Expenses & Others

- ☐ Medical receipts (*rather than bringing many receipts, it is better, to ask your pharmacy for a summary report at the end of year for tax purposes*)
- ☐ Private health insurance plan receipts
- ☐ Charity and political party receipts
- ☐ Professional or Union dues receipts
- ☐ Investment Management fees or carrying charges
- ☐ Property taxes or rent paid

### Savings and benefits

- ☐ RRSP (registered retirement savings plans) contributions/ T4RSP withdrawal
- ☐ RRIF (registered retirement income fund) contributions/withdrawal
- ☐ FHSA (first home savings account) contributions/T4FHSA withdrawal

### Miscellaneous

- ☐ Volunteer Firefighters certification
- ☐ Search and Rescue volunteers' certification
- ☐ Eligible teacher / educator school supplies certified by school (*for teachers only*)

### Family

- ☐ Marital status change in the year
- ☐ Address changes
- ☐ Child care expenses
- ☐ Spousal support payments paid or received
- ☐ Custody arrangements documentation (*in case of separation or divorce*)
- ☐ Adoption expenses

### Student

- ☐ Tuition and education T2202A
- ☐ T4A – scholarships, bursaries,
- ☐ Student loan interest paid

### Special

- ☐ Rental Income and expenses
- ☐ Business / self-employed Income and Expenses; GST/HST
- ☐ Vehicle travel logbook and expenses, odometer readings
- ☐ Home office space and related expenses
- ☐ Sale of principal residence details
- ☐ Home renovations receipts (*for seniors and disabled*)
- ☐ Moving expenses
- ☐ Declaration of employment conditions signed by employer (T2200)
- ☐ Tradespersons and apprentice mechanics tools
- ☐ COVID benefits repayments
- ☐ any other expenses receipt

### Deceased

- ☐ Will, Death certificate, asset lists, ...etc.

### Residency

- ☐ Immigrants and newcomers
- ☐ Emigrants and Non-residents
- ☐ Canadian source income
- ☐ NR slips; NR4, NR6