

## Tax Documents Checklist

<p><b>Income</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> T4 – Employment Income</li><li><input type="checkbox"/> T4A - Pension and scholarships income</li><li><input type="checkbox"/> T4A(P) – Canada Pension income</li><li><input type="checkbox"/> T4A(OAS) - Old Age Security benefits</li><li><input type="checkbox"/> T4E - Employment Insurance benefits</li><li><input type="checkbox"/> T4RIF - RRIF withdrawals</li><li><input type="checkbox"/> T4RSP - RRSP withdrawals</li><li><input type="checkbox"/> T3, T5, T5008, T5013 - Interest, dividends, capital gains, investment income and capital gains and investment income for stocks/bonds/mutual funds</li><li><input type="checkbox"/> T5007 - Social assistance received and Worker's compensation benefits</li><li><input type="checkbox"/> T4PS - Employee profit sharing and stock options exercised</li><li><input type="checkbox"/> Foreign Income details</li><li><input type="checkbox"/> Foreign Pension Income</li><li><input type="checkbox"/> RC210, ... <i>any other income related documents</i></li></ul> <p><b>Expenses &amp; Others</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Medical receipts (<i>rather than bringing many receipts, it is better, to ask your pharmacy for a summary report at the end of year for tax purposes</i>)</li><li><input type="checkbox"/> Private health insurance plan receipts</li><li><input type="checkbox"/> Charity and political party receipts</li><li><input type="checkbox"/> Professional or Union dues receipts</li><li><input type="checkbox"/> Investment Management fees or carrying charges</li><li><input type="checkbox"/> Property taxes or rent paid</li></ul> <p><b>Savings and benefits</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> RRSP (registered retirement savings plans) contributions/ T4RSP withdrawal</li><li><input type="checkbox"/> RRIF (registered retirement income fund) contributions/withdrawal</li><li><input type="checkbox"/> FHSA (first home savings account) contributions/T4FHSA withdrawal</li></ul> <p><b>Miscellaneous</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Volunteer Firefighters certification</li><li><input type="checkbox"/> Search and Rescue volunteers' certification</li><li><input type="checkbox"/> Eligible teacher / educator school supplies certified by school (<i>for teachers only</i>)</li></ul>	<p><b>Family</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Marital status change in the year</li><li><input type="checkbox"/> Address changes</li><li><input type="checkbox"/> Child care expenses</li><li><input type="checkbox"/> Spousal support payments paid or received</li><li><input type="checkbox"/> Custody arrangements documentation (<i>in case of separation or divorce</i>)</li><li><input type="checkbox"/> Adoption expenses</li></ul> <p><b>Student</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Tuition and education T2202A</li><li><input type="checkbox"/> T4A – scholarships, bursaries,</li><li><input type="checkbox"/> Student loan interest paid</li></ul> <p><b>Special</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Rental Income and expenses</li><li><input type="checkbox"/> Business / self-employed Income and Expenses; GST/HST</li><li><input type="checkbox"/> Vehicle travel logbook and expenses, odometer readings</li><li><input type="checkbox"/> Home office space and related expenses</li><li><input type="checkbox"/> Sale of principal residence details</li><li><input type="checkbox"/> Home renovations receipts (<i>for seniors and disabled</i>)</li><li><input type="checkbox"/> Moving expenses</li><li><input type="checkbox"/> Declaration of employment conditions signed by employer (T2200)</li><li><input type="checkbox"/> Tradespersons and apprentice mechanics tools</li><li><input type="checkbox"/> COVID benefits repayments</li><li><input type="checkbox"/> <i>any other expenses receipt</i></li></ul> <p><b>Deceased</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Will, Death certificate, asset lists, ...etc.</li></ul> <p><b>Residency</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Immigrants and newcomers</li><li><input type="checkbox"/> Emigrants and Non-residents</li><li><input type="checkbox"/> Canadian source income</li><li><input type="checkbox"/> NR slips; NR4, NR6</li></ul>
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