



## **TAX FILING CHECKLIST**

### **Slips**

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Tuition and Enrollment Certificate (T2202)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions, annuities and COVID 19 benefits (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- Statement of RRSP income T4RSP
- Canada workers benefit advance payments statement RC210
- All other information slips that are not listed above.

### **Receipts**

- RRSP contribution receipts
- Support for a child, spouse, or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons & apprentice mechanics)
- Eligible temporary relocation expenses (Tradespersons)
- Other employment expenses
- Teacher's school supplies
- Medical expenses
- Home renovations (seniors and disabled)
- Charitable donations
- Political contributions
- Childcare expenses
- Adoption expenses
- Moving expenses
- Interest paid on student loans
- Carrying charges and interest expenses
- Office-in-home 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
- Rental income and expense receipts
- Business, farm, or fishing income/expenses
- Automobile/Travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200 or T2200S)
- Volunteer Firefighters certification & Search and Rescue volunteers' certification
- Written certification for eligible educator school supplies

### **First Time Income Tax Filers**

- Passport (picture, visa, date of first entry into Canada & address pages)
- Study/Work permit
- Landing papers or proof permanent residence (Applicable only for landed immigrants)
- World income figures from January 1st till the date of arrival in Canada current year
- World income figures from January 1st till December 31 previous year & a year before

### **Direct deposit information**

- Branch/Transit No
- Financial Institution No
- Bank Account Number

Please note that this list serves as a general guide. You are required to bring a piece of government issued photo identity card along with all the documents that are relevant or necessary for filing your taxes.

