

TAX CHECKLIST

Taxify Canada Inc.

This checklist is intended as a guide and covers only the most common tax documents. It is not a complete list. You may not need every document listed here, and you may be required to provide additional documents that are not on this list, depending on your specific tax situation.

For example, if you are self-employed, you must provide your income details (such as tax summaries from providers or copies of the invoices you issued) and a summary of all incurred expenses.

FOR MORE INFORMATION VISIT:

www.Taxifycanada.ca /

Info@taxifycanada.ca / (416) 846-1616

Income Slips

Slip Name	Purpose	What it Reports
T4	Employment Income	Salary, wages, and income tax withheld.
T4A	Other Income	Pension, annuities, self-employed commission income, and certain scholarships.
T5	Investment Income	Interest, dividends, and other investment income from non-registered accounts.
T4E	Statement of Employment Insurance and Other Benefits	Regular Employment Insurance (EI) benefits, Maternity and parental benefits, Sickness benefits, (CERB) etc.
T5008	Securities Transactions	Reports proceeds from the sale of investments (stocks, bonds). Used to calculate Capital Gains/Losses.
T4RSP	Registered Retirement Savings Plan	Reports payments received from an RRSP.
T4RIF	Registered Retirement Income Fund	Reports payments received from an RRIF.

Tax Deduction & Credit Slips

Slip Name / Document	Purpose	What it Reports
T2202	Tuition and Enrolment	Issued by colleges or universities to claim the Tuition Tax Credit and carry forward unused amounts.
T777	Statement of Employment Expenses	This is the form you prepare using your supporting receipts, particularly for Home Office Expenses or other required work costs.
RRSP TAX SLIP	RRSP Contributions	Official receipts showing the total amount contributed to an RRSP.
T4FHSA	First Home Savings Account	Reports contributions and transfers into an FHSA account.
Charitable Donation Receipts	Charitable Tax Credit	Official receipts from registered charities.
Medical Expense Receipts	Medical Expense Tax Credit	Receipts for prescriptions, dental work, vision care, and health premiums paid out-of-pocket.
Child Care Receipts	Child Care Expense Deduction	Receipts must include the caregiver's name, address, and (SIN) or Business Number.
Moving Expense Receipts	Moving Expense Deduction	Receipts for hiring movers, rental trucks, travel (gas, lodging, meals), real estate commissions, and legal fees.