

# CANADIAN TAX DOCUMENT CHECKLIST (T1 & TP1)

*For Federal (T1) and Quebec (TP1) Personal Tax Returns*

✓	nan	nan	nan
<b>DOCUMENT TYPE</b>			
<input type="checkbox"/>	Last tax return (if applicable)		
<input type="checkbox"/>	Last Notice of Assessment (if applicable)		
<b>PERSONAL INFORMATION</b>			
<input type="checkbox"/>	Social Insurance Number (SIN)		
<input type="checkbox"/>	Date of birth		
<input type="checkbox"/>	Current address		
<input type="checkbox"/>	Marital status & spouse's SIN		
<input type="checkbox"/>	Direct deposit info for refund		
<b>INCOME DOCUMENTS</b>			
<input type="checkbox"/>	Last tax return (if applicable)		
<input type="checkbox"/>	Last Notice of Assessment (if applicable)		
<input type="checkbox"/>	Employment income	T4	Relevé 1
<input type="checkbox"/>	Old Age Security & CPP benefits	T4OAS / T4AP	T4OAS / T4AP
<input type="checkbox"/>	Other pensions and annuities	Pension slips (official)	Relevés de pension officiels
<input type="checkbox"/>	Employment Insurance benefits	T4E	Relevé 1
<input type="checkbox"/>	Social assistance	T5007	Relevé 5
<input type="checkbox"/>	Workers' Compensation	T5007	Relevé 5
<input type="checkbox"/>	Interest and dividends	T3, T5	Relevé 3, 16
<input type="checkbox"/>	Capital gains (stocks, bonds, real estate)	T5008, trading sheets	TP-726.20.2-V, documents de commerce
<input type="checkbox"/>	Child or spousal support received	Receipts (official)	Reçus officiels
<input type="checkbox"/>	RRSP withdrawals	T4RSP	T4RSP
<input type="checkbox"/>	Rental income	Receipts (official)	Reçus officiels

<input type="checkbox"/>	Business/professional/commission income	Invoices (income); receipts (expenses)	Factures (revenus); reçus (dépenses)
<input type="checkbox"/>	Farm and fishing income	Invoices; receipts	Factures; reçus
<input type="checkbox"/>	Foreign income	Foreign income slips	Relevés de revenus étrangers
<input type="checkbox"/>	Universal Child Care Benefit	RC62	RC62
<input type="checkbox"/>	Self-employed/contract/freelance	T4A	Relevé 1
<b>DEDUCTIONS</b>			
<input type="checkbox"/>	RRSP contributions (incl. Home Buyers' Plan)	Official RRSP slips	Official RRSP slips
<input type="checkbox"/>	Union or professional dues	Receipts (if not on T4)	Receipts (if not on T4)
<input type="checkbox"/>	Carrying charges & interest expenses	Receipts (official)	Receipts (official)
<input type="checkbox"/>	Moving expenses	Receipts (official)	Receipts (official)
<input type="checkbox"/>	Childcare expenses	Invoices with SIN or T778	Invoices with SIN or T778
<input type="checkbox"/>	Business-use-of-home	Receipts/invoices (official)	Receipts/invoices (official)
<input type="checkbox"/>	Automobile expenses	Travel/km log; receipts	Travel/km log; receipts
<input type="checkbox"/>	Stock option and shares deduction	T5008 and trading summary	T5008 and trading summary
<input type="checkbox"/>	Child/spousal support paid	Receipts	Receipts
<input type="checkbox"/>	Travel expenses	Receipts	Receipts
<input type="checkbox"/>	Losses of other years	Notice of Assessment	Notice of Assessment
<b>Capital gains deduction</b>			
<input type="checkbox"/>	Remote work-from-home (COVID)	TP59 (detailed method)	TP59
<input type="checkbox"/>	Employment expenses	T2200 signed by employer	TP-64.3
<input type="checkbox"/>	<b>TAX CREDITS</b>		
<input type="checkbox"/>	Age credit	Auto-calculated if eligible	Auto-calculated if eligible
<input type="checkbox"/>	Spousal/common-law credit	Auto-calculated if eligible	Auto-calculated if eligible
<input type="checkbox"/>	Spousal/common-law credit transfers	From spouse's return	From spouse's return
<input type="checkbox"/>	Eligible dependent	Auto-calculated if eligible	Auto-calculated if eligible
<input type="checkbox"/>	Canada Caregiver Credit	T2201 or signed statement from a medical practitioner	
<input type="checkbox"/>	Canada Training Credit	Tuition receipts from designated	Tuition receipts from designated

		institutions	institutions
<input type="checkbox"/>	Canada Employment Amount	Auto-calculated if employed	Auto-calculated if employed
<input type="checkbox"/>	Solidarity Tax Credit Housing Component (Quebec)		RL31
<input type="checkbox"/>	Northern Villages residence (Quebec)		Auto-calculated if eligible
<input type="checkbox"/>	QST Credit (Quebec)		Auto-calculated if eligible
<input type="checkbox"/>	Pension income credit	Pension income slips	Pension income slips
<input type="checkbox"/>	Tuition fees	T2202	Relevé 8
<input type="checkbox"/>	Disability credit	T2201 (signed by medical professional)	TP-752.0.14-V (signed by medical professional)
<input type="checkbox"/>	Medical expenses	Detailed statements or receipts	Detailed statements or receipts
<input type="checkbox"/>	Charitable & political donations	Receipts with official tax donation #	Receipts with official tax donation #
<input type="checkbox"/>	Federal political contribution credit	Official receipts	Official receipts
<input type="checkbox"/>	Caregiver credit (Quebec)		Certificate Respecting an Impairment (TP-752.0.14-V) Certificate of Ongoing Assistance (TP-1029.AN.A-V)
<input type="checkbox"/>	Children's Fitness Tax Credit	Official receipts	
<input type="checkbox"/>	Tax Credit for Children's Activities (Quebec)		Official receipts
<input type="checkbox"/>	Interest on student loans	Financial institution slip	Financial institution slip
<input type="checkbox"/>	Adoption expenses	Official receipts	Official receipts
<input type="checkbox"/>	Home buyer's amount (Federal)	Purchase agreement	Purchase agreement
<input type="checkbox"/>	First-time home buyer's credit (Quebec)	Purchase agreement	Purchase agreement
<input type="checkbox"/>	Multigenerational home renovation credit	Receipts for qualifying renovations	Receipts for qualifying renovations
<input type="checkbox"/>	Digital news subscriptions	Receipt(s)	Receipt(s)
<input type="checkbox"/>	Public transit passes (if eligible)	Monthly/annual pass receipts	Monthly/annual pass receipts
<input type="checkbox"/>	Tax credit for experienced workers 60+ (QC)		Auto-calculated if employed
<input type="checkbox"/>	Volunteer firefighter/search & rescue (QC)	Certificate from organization	Certificate from organization

### HELPFUL ORGANIZATION TIPS

- Check off items on this list as you gather them
- Take clear photos of paper documents for digital backup

• Most tax slips arrive by late February - collect everything by early March

• Keep copies or digital scans of everything you submit

• Access many slips online: CRA My Account (federal) & Revenu Québec (provincial)

• Missing documents? Request duplicates from employers/pharmacy/financial and educational institutions

• Filing deadline: April 30 (or June 15 if self-employed, payment due April 30)