

# PERSONAL TAX CHECKLIST

**We want to make sure you get every tax credit and deduction you're entitled to.**

So, before you get started on your taxes, make sure you have all the receipts and income records you need.

**Here's a handy checklist:**

## Slips

- ☐ T4 slips (Employment income)
- ☐ Employment insurance benefits (T4E)
- ☐ Interest, dividends, mutual funds (T3, T5, T5008)
- ☐ Tuition / education receipts (T2202A)
- ☐ Old Age Security and CPP benefits (T4A-OAS, T4AP)
- ☐ Other pensions and annuities (T4A)
- ☐ Social assistance payments (T5007)
- ☐ Workers' compensation benefits (T5007)
- ☐ All other information slips

## Receipts

- ☐ RRSP contribution receipts
- ☐ Support for a child, spouse or common-law partner
- ☐ Professional or union dues
- ☐ Tool expenses  
(Tradespersons & apprentice mechanics)
- ☐ Other employment expenses
- ☐ Teacher's school supplies
- ☐ Medical expenses
- ☐ Home renovations (seniors and disabled)
- ☐ Charitable donations
- ☐ Political contributions
- ☐ Child care expenses
- ☐ Adoption expenses

## Receipts (continued)

- ☐ Moving expenses
- ☐ Interest paid on student loans
- ☐ Carrying charges and interest expenses
- ☐ Office - in-home expenses
- ☐ Exams for professional certification

## 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)
- ☐ Volunteer Firefighters certification
- ☐ Search and Rescue volunteers certification

