



# Canadian Tax Checklist

Get a head start on tax season by using this checklist of the essential forms and receipts required for filing your return.

## Personal Information

Social Insurance Number (SIN)  
Date of Birth  
Information about spouse/common-law partner  
Information about dependents  
Spouse and/or child net income amounts

Tuition transfer amount from spouse or child  
Last year's tax return  
Notice of Assessment from last year's return  
Total amount of instalment payments made to the CRA  
Other CRA correspondence

## Income

Employment income (T4)  
Self-employed business income (T2125, T5013, T4A)  
Interest, dividends, mutual funds (T3, T5, T5008)  
Rental income and expenses (T776)  
Old Age Security and CPP benefits (T4A-OAS, T4A-P)  
Pension and annuity income (T4A)  
RRSP and RIF income (T4RSP, T4RIF)  
Employment insurance benefits (T4E)  
Social assistance payments (T5007)  
Workers' compensation benefits (T5007)  
Other income not reported on a slip (e.g. tips)  
RL-1 Employment and other income (QC)

## Receipts

RRSP and FHSA contributions  
Employment expenses (T2200 signed by employer)  
Tool expenses  
Union dues not included on your T4 slip  
Exams for professional certification  
Teacher's school supplies  
Childcare expenses  
Support payments paid or received  
Adoption expenses  
Disability tax credit for self or dependents  
Medical expenses  
Personal attendant/facility care expenses  
Charitable donations  
Northern residents deduction  
Digital News subscription expenses  
Political contributions  
Moving expenses  
Home accessibility expenses  
Home Buyers' Amount  
Tuition expenses  
Student loan interest amounts  
Tax-exempt scholarships

## Other Information

Sale of principal residence  
Sale or deemed sale of stocks, bonds or real estate  
RRSP deduction limit and unused amounts  
Tuition carry forward amounts  
Loss carry forward amounts  
Other carry forward amounts (donations, etc.)