

Personal Tax Checklist

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)
- Universal Child Care Benefit (RC62)
- 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

Receipts

- RRSP contribution receipts
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons & apprentice mechanics)
- Medical expenses
- Transit pass receipts
- Charitable donations
- Childcare expenses
- Adoption expenses
- Children's arts and sports programs
- 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 from your last year your taxes were completed
- Canada Revenue Agency correspondence
- Sale of your home – date and price purchased, date and price sold
- Rental income and expense receipts
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification
- Search and Rescue volunteer's certification
- Custody Arrangement documentation