

TAX PREPARATION CHECKLIST

Stay organized and get a head start on tax season with this list of slips and receipts you'll need to file your taxes.

INCOME SLIPS

- All T4 slips - Employment Income
- T3, T5, T5008 - Interest, dividends, mutual funds
- T4E - Employment insurance benefits
- T4AOAS, T4APOld - Age Security benefits
- T5007 - Social Assistance & Worker compensation benefits
- T4RSP, T4RIF - RRSP and RIF income
- RL-1 Employment and other income (if you worked in QC)
- Other income not reported on a slip (e.g. tips)

OTHER DOCUMENTATION

- Automobile/Travel Logbooks
- Business, farm, or fishing income and expense records
- Canada Revenue Agency correspondence
- Capital gains/losses records
- Declaration of Conditions of Employment (T2200)
- Disability Tax Credit Certificate (T2201)
- Northern residents deductions
- Notice of Assessment
- Rental income & expense record

RECEIPTS

- Adoption expenses
- Carrying charges and interest expenses
- Charitable donations
- Childcare expenses
- Children's fitness programs
- Interest and dividend payments
- Medical expenses
- Moving costs
- Office-in-home expenses
- Political contributions
- Professional fees
- Property tax receipt
- RRSP contributions
- Rent Paid during the year
- Sale or deemed sale of stocks, bonds or real estate
- Student loan interest payments
- Support for a child, spouse, or common-law partner
- Tool expenses (tradespersons)
- Travel expenses
- Tuition/Education amounts (For qualifying students)
- Union dues
- Vehicle expenses

