



Canadian Tax Checklist

To maximize your refund and give you every tax credit and deduction you are entitled to make sure you have all the receipts and income records

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5)
- 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
- RRSP contribution slips
- Professional or union dues
- Tool expenses (Trades persons)
- Medical expenses
- Transit pass receipts
- Charitable donations
- Political contributions
- Child care 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
- Canada Revenue Agency correspondence
- Sale or deemed sale of stocks, bonds or real estate
- Northern residents deductions
- Rental income and expense records
- Business, farm or fishing income/expenses
- Automobile / Travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification