

Tax Return Checklist

Don't miss a **tax credit** or **deduction**. Gather all your **slips**, **receipts** and **documentation** before filing your **tax return**.

Tax Slips:

- ☐ All T4 slips (employment income)
- ☐ Mutual funds, interest, dividends (T3, T5)
- ☐ EI benefits (T4E)
- ☐ Other pensions and annuities (T4A)
- ☐ Old Age Security and CPP (T4A-OAS, T4AP)
- ☐ RRSP and RRIF income (T4 RSP, T4 RIF)
- ☐ Universal Child Care Benefit (RC62)
- ☐ Social assistance payments, worker's compensation (T5007)
- ☐ Tuition (T2202A)
- ☐ All other information slips (e.g. T101, T5013, T2200)

Receipts:

- ☐ RRSP contribution slip
- ☐ Transit pass receipts
- ☐ Moving expenses
- ☐ Rent/property tax receipts (province dependent)
- ☐ Medical expenses
- ☐ Charitable donation receipts
- ☐ Political donations receipts
- ☐ Interest paid on student loans
- ☐ Children's fitness receipts
- ☐ Children's arts receipts
- ☐ Child care expenses
- ☐ Adoption expenses
- ☐ Child support receipts, alimony payments
- ☐ Attendant expenses for disabled person
- ☐ Support for child, spouse or common-law partner
- ☐ Office-in-home expenses
- ☐ Tool expenses (for tradespersons)
- ☐ Exams for professional certification
- ☐ Professional or union dues
- ☐ Carrying charges and interest expenses

Tax Filing Info:

- ☐ Last year's Notice of Assessment
- ☐ Last year's tax return
- ☐ NETFILE access code (if e-filing)
- ☐ Any correspondence with CRA

Other Information:

- ☐ Small business income and expenses
- ☐ Farm or fishing income and expenses
- ☐ Rental income and expenses
- ☐ Volunteer firefighters certification
- ☐ Disability tax credit certificate
- ☐ Sale of stocks, bonds or real estate
- ☐ Auto/travel logbook and expenses
- ☐ Northern residents information
- ☐ Amounts paid in tax instalments

Sources: **Canada Revenue Agency,
SimpleTax, H&R Block**