



# Canada Tax Checklist



**Before getting started, please prepare the following documents:**

## PERSONAL INFORMATION

- Social Insurance Number (SIN)
- Personal information (Full name, Date of Birth (DOB), Address, postal code, Marital Status)
- Spouse or Common-law partner information (if applicable)
- Dependent/s information (if applicable)
- Spouse and child net income (if applicable)
- Preferred Direct Deposit (if applicable)
- Previous Year's Notice of Assessment: this can help reference important information needed for your current return.

## INCOME SLIPS

- T4 (Statement of Remuneration Paid): You should receive a T4 slip from each employer you worked for during the tax year. This slip summarizes your employment income, deductions, and taxes withheld.
- T4A (Statement of Pension, Retirement, Annuity, and Other Income): If you received other types of income, such as pension or self-employment income, you may receive a T4A slip for reporting these amounts.
- T4E (Statement of Employment Insurance and Other Benefits): If you received

Employment Insurance (EI) benefits during the tax year, you should receive a T4E slip detailing these amounts.

- T4RSP (Statement of RRSP Income): If you withdraw from your Registered Retirement Savings Plan (RRSP), you should receive a T4RSP slip detailing these amounts.
- T4RIF (Statement of Income from a Registered Retirement Income Fund): If you received income from a Registered Retirement Income Fund (RRIF), you should receive a T4RIF slip detailing these amounts.
- T5 (Statement of Investment Income): If you earned investment income, such as interest, dividends, or capital gains, you might receive a T5 slip for reporting these amounts.
- T3 (Statement of Trust Income Allocations and Designations): If you received income from a trust, you may receive a T3 slip detailing these amounts.
- T5007 (Statement of Benefits): If you received social assistance payments or workers' compensation benefits, you may receive a T5007 slip detailing these amounts.
- Any other slips or income not reported on a slip, like tips (if applicable)

## RECEIPTS

- RRSP contributions (if applicable)
- Receipts for Charitable Donations (if applicable): If you donated to registered charities, you could claim a tax credit for these contributions. Keep receipts for any donations made during the tax year.
- Receipts for Medical Expenses (if applicable): Certain medical expenses may be eligible for a tax credit. Keep receipts for prescription medications, dental services, and other eligible expenses.
- Receipts for Employment Expenses (if applicable): If you have eligible employment expenses, such as vehicle expenses, supplies, professional and Union dues not included on your T4 slip and Exams for professional certification, you'll need to gather receipts to support these deductions.
- T2200 (Declaration of Conditions of Employment) (if applicable): If you have expenses related to your employment that your employer does not reimburse, you may need to complete a T2200 form signed by your employer to claim these expenses.
- Receipts for Childcare Expenses (if applicable): Keep receipts for childcare expenses paid during the tax year. Eligible childcare expenses may include daycare fees, babysitting services, and after-school programs.
- Support payments paid or received (if applicable)
- Receipts for Home Buyer's Amount (if applicable): If you purchased a home during the tax year, keep receipts or documentation related to eligible expenses for the Home Buyer's Amount tax credit.
- Documentation for Sale of Principal Residence (if applicable): If you sold your principal residence during the tax year, gather documentation related to the sale, including the sale price, acquisition date, and any capital improvements made to the property.

## OTHER INFORMATION

- Tuition transfer amount from spouse or child
- Total amount of instalment payment to CRA
- Other CRA correspondence

## NEXT STEPS

- Fill out and Sign the Individual Tax Interview Form: Complete and sign the Individual Tax Interview form, providing detailed information about your tax situation and any applicable deductions or credits.
- Fill out and Sign the Privacy Policy: Ensure you fill out and sign the privacy policy included with your tax return forms.
- Fill out and Sign the Authorization Form: Complete and sign the authorization form required for your tax filing, allowing us to act on your behalf. (AUT-01 Form)