



Canada Newcomer's Tax Checklist



Before getting started, please prepare the following documents:

PERSONAL INFORMATION

- Social Insurance Number (SIN): Your SIN is essential for filing taxes in Canada. You'll need to apply for one if you're a newcomer and haven't obtained an SIN yet.
- 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)
- Immigration Documents: Have copies of your immigration documents ready, such as your permanent resident card, Confirmation of Permanent Residence (COPR), Study permit, Work permit or other relevant documents.
- Proof of Residency: Have documents to establish your residency status in Canada, such as rental agreements, utility bills, or a lease agreement.

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.

- Foreign Income Documents: If you earned income outside of Canada, you may need to report it on your Canadian tax return. Gather any documents related to foreign income, such as foreign employment income statements, bank statements, or investment income statements.
- T4A (Statement of Pension, Retirement, Annuity, and Other Income): If you received other income such as pensions, annuities, or scholarships, you may receive a T4A slip for reporting 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.
- 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.
- Any other slips or income not reported on a slip, like tips (if applicable)

RECEIPTS

- Receipts for Moving Expenses (if applicable): If you moved to Canada from another country to establish residency for employment or educational purposes, you may be able to claim moving expenses.
- 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 Educational Expenses (if applicable): Keep receipts for other eligible educational expenses, such as textbooks, supplies, and mandatory fees.
- T2202A (Tuition, Education, and Textbook Amounts Certificate) (if applicable): This form is issued by your educational institution and is used to claim tuition and education amounts on your tax return.
- RRSP contributions (if applicable)
- 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 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.

OTHER INFORMATION

- Tuition transfer amount from spouse or child

- Previous Year's Tax Documents: If applicable, have any tax documents from your previous country of residence, as they may be needed for reporting purposes or claiming foreign tax credits.

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)