

# Income Tax Checklist

We want to guarantee that you will receive every tax credit and deduction you're entitled to.

Before you start on your taxes, please ensure you have all the receipts and income records you need.

Here is a checklist:

## Slips

- Interest, dividends, mutual funds (T3, T5, T5008)
- Tuition / education receipts (T2202A)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Universal Child Care Benefit (RC62)
- All other information slips

## Receipts

- Children's arts and sports programs
- Moving expenses
- RRSP contribution receipts
- Support for a child, spouse, or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons & apprentice mechanics)
- Medical expenses
- Transit pass receipts
- Charitable donations
- Political contributions
- Childcare expenses
- Adoption expenses

## Receipts (continued)

- Carrying charges and interest expenses
- Office in-home expenses
- Exams for professional certification
- Interest paid on student loans

## Other documentation

- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification
- Notice of Assessment/Reassessment
- Canada Revenue Agency correspondence
- Sale or deemed sale of stocks / bonds
- Rental income and expense receipts
- Business, farm or fishing income/expenses
- Automobile / Travel logbook and expenses
- Disability Tax Credit Certificate
- Sales and / or purchase of real estate (including primary residence)
- Search and Rescue volunteer's certification
- Custody Arrangement documentation
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