

# Personal Tax Checklist

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## We want to make sure you get every tax credit and deduction you're entitled to.

So, before you get started on your taxes, make sure you have all the receipts and income records you need.

### Here's a handy checklist:

#### Slips

- ☐ T4 slips (Employment income)
- ☐ Employment insurance benefits (T4E)
- ☐ Interest, dividends, mutual funds (T3, T5, T5008)
- ☐ 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

#### Receipts

- ☐ 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
- ☐ Child care expenses
- ☐ Adoption expenses
- ☐ Children's arts and sports programs
- ☐ Moving expenses

#### Receipts (continued)

- ☐ 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 receipts
- ☐ Rental income and expense receipts
- ☐ Business, farm or fishing income/expenses
- ☐ Automobile / Travel logbook and expenses
- ☐ Disability Tax Credit Certificate
- ☐ Declaration of Conditions of Employment (T2200)
- ☐ Volunteer Firefighters certification
- ☐ Search and Rescue volunteers certification
- ☐ Custody Arrangement documentation
- ☐ \_\_\_\_\_