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TAX PREPARATION CHECKLIST

This checklist will come in handy when trying to gather everything you need to take when having your taxes prepared by a professional.

Slips

- T4 – Employment Income
- T4E – Employment Insurance Benefits
- T3 – Interest
- T5 – Dividends
- T50008 – Mutual Funds
- T2202A – Tuition/education receipts
- T4A-OAS, T4AP, T4A – Old Age Security, CPP benefits, & other pension & annuities
- T5007 – Social assistance payments & Workers' Compensation benefits
- All other information slips

Receipts

- RRSP contributions receipts
- Support for a child, spouse or common-law partner
- Childcare expenses
- Adoptions expenses
- Professional or union dues
- Exams for professional certification
- Tool expenses (Trade persons and apprentice mechanics)
- Office-in-home expenses
- Other employment expenses
- Interest paid on student loans
- Teacher's school supplies
- Medical expenses
- Moving expenses

- Carrying charges and interest expenses
- Home renovations (for seniors and disabled)
- Charitable donations
- Political contributions

Other Documentation

- Business, farm or fishing income/expenses
- Rental income and expense receipts
- Automobile/travel logbook and expenses
- Sale of principal residence
- Sale or deemed sale of stocks, bonds or real estate
- Northern residents' deductions receipts
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification
- Search and Rescue Volunteers certification
- Written certification for eligible educator school supplies
- Notice of Assessment/Reassessment
- Canada Revenue Agency correspondence
- Others