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## **GENERAL TAX INFORMATION CHECKLIST**

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Name:

Phone:

Email:

**We want to make sure you get every tax credit and deduction you're entitled to. Please use this list as a guideline for tax information you may have received.**

Mailing Address:

Marital Status:

SIN:

### **CRA Documents & Tax Slips**

**2020 Notice of Assessment**  
**T4 Slips & Other Employment Information**  
**T4A slip for CERB, CRB**  
**T4A(OAS), T4AP, T4A, T4RSP, T4RIF**  
**T3, T5, T5013, T5007, T5008**  
**RL Slips for Quebec Residents**  
**Other pensions or annuities**  
**T4E Employment Insurance Benefits**  
**RRSP Contribution slips**  
**Foreign (eg. US Soc. Sec. UK pension**

### **Other Documents**

**Capital Gains/Losses Documents  
(sales of stocks, bonds or real estate)**  
**Principle Residence Sales Report**  
**T2200/T2200S Employment Expense Checklist**  
**Self-employment Checklist**  
**Rental - Income & Expenses Checklist**  
**Installment payments from the year**

### **CRA Documents & Tax Slips**

**Federal & Ontario Healthy Home  
Improvement Tax Credit Receipts**  
**Property Tax/Rent Receipts with the  
approval of payment**  
**Child/Spousal Support**  
**Childcare expenses**  
**Professional Fees or/Union Dues**  
**Tuition Paid (T2202)**  
**Senior Bus Passes for Ontario residents**  
**Interest paid on investment loan**  
**Carrying Charges**  
**Charitable/Political Receipts**  
**Medical Expense Receipts/Checklists**

- Medical Insurance Premiums (Incl. Travel Insur. Medical Portion)
- Medical Expense Receipts
- Medical Summaries from Insurance Co. (Detailed Summaries)
- Prescriptions (Detailed Summary)
- Nursing/Retirement Home Annual Statement

## **NOTES/THING YOU WANT US TO KNOW**