
GENERAL TAX INFORMATION CHECKLIST

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 & Income Slips

Notice of Assessment
T4 Slips & Other Employment Information
T4A slip for CERB, CRB or CERB repayment
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

Eligible Expense Receipts

**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
Staycation 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