



469 Elgin Street
Ottawa, ON
K2P 2H2

Canadian Income Tax Checklist

General Items

- Copy of last year's tax return (new clients)
- Copy of last year's Notice of Assessment (new clients)
- Installment payments made if applicable
- Direct deposit information if desired

Slips

- CPP benefits (T4AP)
- Employment income (T4)
- Employment insurance benefits (T4E)
- Interest/dividends (T3, T5)
- Old age Security (T4A-OAS)
- RRSP Withdrawal (T4RSP)
- Social assistance payments (T5007)
- Tuition (T2202A)
- Workers compensation benefits (T5007)
- All other information slips

Receipts

- Adoption expenses
- Carrying charges and interest expenses
- Charitable donations
- Child care expenses
- Interest paid on student loans
- Medical expenses
- Moving expenses
- Political donations
- Professional or union dues
- Rent or property taxes paid
- RRSP contribution slip
- Support for a child or spouse
- Tool expense (Tradespersons)
- Transit pass receipts

Other Items

- Business income and expense records
- Declaration of conditions of employment (T2200)
- Disability tax credit certificate
- Employment expenses
- Investment management fees paid
- Legal fees paid to recover wages from employer
- Realized gain/loss report
- Rental income and expense records
- Trading summary (T5008)
- Vehicle travel log book and expenses

This checklist is effective as of July 2018.