

# SimpleTax

## Canadian Tax Checklist

We're here to help you maximize your refund. Use our checklist to help gather your documents so you're ready to party on tax and pizza night.

### Tax Slips

- Employment income (T4) ★
- Employment insurance benefits (T4E) ★
- Pension and annuity income (T4A) ★
- CPP and OAS slips (T4A(P) and T4A(OAS)) ★
- Investment income (T3, T5, and T5008) ★
- Partnership income (T5013)
- Tuition (T2202 or TL11) ★
- Universal Childcare Benefit (RC62) ★
- Social assistance and worker's comp (T5007) ★
- RRSP and RIF income (T4RSP, T4RIF) ★
- Any other tax slips

### Receipts

- Charitable and political donations
- RRSP contributions ★
- Medical expenses
- Transit passes
- Children's fitness and arts expenses
- Child care expenses
- Adoption expenses
- Student loan interest
- Professional or union dues (if not on a T4)
- Investment advisor fees and interest expenses
- Moving expenses
- School supply expenses (teachers) +
- Tools expenses
- Employment expenses & form T2200
- Exam fees for professional designations
- Rent or property tax (Ontario and Manitoba)
- Legal expenses to collect alimony, pension or retiring allowance
- Home accessibility expenses (if a senior or eligible for the disability tax credit) +

### Other Documents

- Last year's notice of assessment from the CRA
  - ➔ Tuition carry forward amounts ★
  - ➔ RRSP deduction limit and unused amounts ★
  - ➔ Loss carry forward amounts ★
- Other CRA correspondence
- Last year's tax return (helpful if switching)
- Instalment payment amounts ★
- Information about your dependants
  - ➔ Birthday and net income
  - ➔ Post-secondary tuition available for transfer
- Capital gains information (if no T5008 slips)
- Child support or alimony information
- Home buyers' plan and lifelong learning plan information ★
- Information about the sale of your principal residence +
- Disability tax credit certificate
- Rental property income and expenses
- Self-employed people and commissioned employees
  - ➔ Income and expenses
  - ➔ Vehicle logbook
  - ➔ In-home office expenses
- Volunteer firefighter's or search and rescue volunteer certificate
- Graduate retention certification (Saskatchewan)
- Northern residents information
- Business investment loss information (if you invested in a company that went bankrupt)
- RentAssist information (Manitoba) ★ +