

SimpleTax 2017 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) ★
- Social assistance and worker's comp (T5007) ★
- RRSP and RIF income (T4RSP, T4RIF) ★
- Universal Childcare Benefit (RC62) ★
- Any other tax slips

Receipts

- Charitable and political donations
- RRSP contributions ★
- Medical expenses
- Child care expenses
- Children's fitness and arts expenses (BC, MB, YT, QC)
- Adoption expenses
- Student loan interest
- Professional or union dues (if not included on your T4)
- Investment advisor fees and interest expenses
- Moving expenses
- School supply expenses (teachers)
- Tools expenses
- Employment expenses & form T2200
- Travel expenses (transportation employees)
- Examination fees for professional designations
- Rent or property tax (ON, MB)
- Legal expenses to collect alimony, pension or retiring allowance
- Home renovation/accessibility expenses (if a senior or eligible for the disability tax credit)
- Transit passes from Jan 1 - Jun 30, 2017 (Ontario seniors can claim passes all year)

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 for first time users)
- 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 (SK)
- Northern residents information
- Business investment loss information (if you invested in a company that went bankrupt)
- RentAssist information (MB) ★