

# SimpleTax 2018 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) ★
- Tuition (T2202 or TL11) ★
- Social assistance and worker's comp (T5007) ★
- RRSP and RIF income (T4RSP, T4RIF) ★
- Partnership income (T5013)
- Any other tax slips

## Receipts

- Charitable and political donations
- RRSP contributions ★
- Medical expenses
- Child care expenses
- Children's fitness and arts expenses (MB, YT)
- 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
- 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 (Ontario seniors only)

## 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
- Northern residents information
- Business investment loss information  
(if you invested in a company that went bankrupt)
- RentAssist information (MB) ★
- Graduate retention certification (SK)

★ Available through Auto-fill my return  
Québec residents, please use [this checklist](#) instead