

SimpleTax 2018 Checklist

For Québec residents

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/RL-1) ★
- Employment insurance benefits (T4E/RL-6) ★
- Pension and annuity income (T4A/RL-1 or RL-2) ★
- CPP slips (T4A(P)/RL-2) ★
- OAS slips (T4A(OAS)) ★
- Investment income (T3/RL-16, T5/RL-3, and T5008/RL-18) ★
- Tuition (T2202/RL-8 or TL11) ★
- Social assistance and worker's compensation (T5007/RL-5) ★
- RRSP and RIF income (T4RSP/RL-2, T4RIF/RL-2) ★
- Partnership income (T5013/RL-15)
- Information about your leased home (RL-31)
- Any other tax slips and relevés

Receipts

- Charitable and political donations
- RRSP contributions ★
- Medical expenses
- Child care expenses (RL-24 and RL-30)
- Children's fitness and arts expenses
- 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
- Legal expenses to collect alimony, pension or retiring allowance
- Home renovation/accessibility expenses (if a senior or eligible for the disability tax credit)

Other Documents

- Last year's notice of assessment from the CRA and Revenu Québec
 - Tuition carry forward amounts ★
 - RRSP deduction limit and unused amounts ★
 - Loss carry forward amounts ★
- Other CRA and Revenu Québec correspondence
- Your 2017 tax return (helpful for first time users)
- Municipal tax bill
- Instalment payment amounts ★
- Information about your dependants
 - Birthday and net income
 - Post-secondary tuition available for transfer
- Capital gains information (if no T5008/RL-18 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)

★ **Federal slip** available through Auto-fill my return