



CANADIAN TAX CHECKLIST

Income Slips:

- Employment Income (T4, T4A)
- Employment Insurance Benefits (T4E)
- Investment Income (T3, T5, T5013)
- Old Age Security (T4A-OAS)
- CPP Benefits (T4AP)
- Pensions and Annuities (T4A, T4RIF, T4RSP)
- Social Assistance Payments (T5007)
- Workers' Compensation Benefits
- Tuition or Education Receipts (T2202)
- Scholarships and Bursaries (T4A)
- Foreign Slips (W-2, 1099, 1042-S)

Other Documents:

- Property Sale Documents (if property sold in 2023)
- Foreign Pension Income
- Rental Income and Expenses
- Business Income and Expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters Certificate or Search and Rescue Volunteers Certificate

Documents for Credits & Deductions:

- *NEW*** FHSA Contribution Receipts
- *NEW*** Renovation receipts for creating/renovating a secondary unit for a family member
- Property Tax and/or Rent Receipts
- Medical Expense Summary
- Charitable Donation Receipts
- RRSP/RPP Contribution Receipts
- Spousal and Child Support Receipts
- Union or Professional Dues Receipts
- Child Care Expense Receipts
- Summary of Adoption Expenses
- Political Contribution Receipts
- Moving Expense Summary
- Carrying Charges and Interest Expenses on Investments
- Interest Paid on Student Loans
- Home Accessibility Expenditures
- School Supplies Receipts (teachers)
- Receipts for Eligible Tools (eligible tradespersons or apprentice mechanics only)