



CANADIAN INCOME TAX CHECKLIST

PERSONAL SLIPS

- All Statement of Income (T4)
- Pension, Retirement, annuity and other income (T4A)
- Statement of Trust Income (T3)
- Statement of Investment Income (T5)
- Statement of CPP Benefits(T4AP)
- Old Age Security Pension (OAS) (T4AOAS)
- Statement of Securities Transactions (T5008)
- Workers' Compensation Benefits / Social Assistance payment (T5007)
- Statement of RRSP Income (T4RSP)
- Statement of Income From a Registered Retirement Income Fund (T4RIF)
- Statement of Partnership Income (T5013)
- Statement of Employment Insurance Benefits (T4E)
- Foreign Income/ Pension
- Statement of Rental Income & Expenses or Form T776

RECEIPTS & TAX CREDITS

- Charitable donations
- Child care expenses
- Children's fitness programs
- Medical expenses
- Political contributions
- Professional and/or Union dues
- Registered Retired Savings Plan (RRSP)
- Student loan interest statement
- Transit Passes
- Tool expenses (apprentice mechanics & tradesperson)
- Home buyer's tax credit
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Custody Arrangement / support payment documentation
- Capital gains/losses records
- Tuition / Education (T2202A)
- Vehicle / Travel Logbooks & Expenses

ADDITIONAL DOCUMENTATION

- Instalment payment summary
- Notice of Assessment / Reassessment
- GST Form
- Any CRA Correspondence
- Alimony / support payments (copy of agreement)
- Copy of Will and Death Certificate (T3 Only)
- Other: _____