




BASIC CANADIAN INCOME TAX CHECKLIST

We are committed to providing you with the best tax refund and finding the tax deductions and credits you are eligible for.

Before we get started on your return, please ensure you have all the receipts and slips needed. Consider bringing the following documents:

TAX SLIPS

-  **NEW** COVID-19 CRB or CERB benefits (T4A or T4E)
- Employment income (T4)
- Employment insurance benefits (T4E)
- Pension and annuity income (T4A)
- Old Age Security & Canada Pension Plan slips (T4A(P) and T4A(OAS))
- Interest, dividends, and Investment income (T3, T5, and T5008)
- Partnership income (T5013)
- Tuition expenses (T2202 or TL11)
- Universal Childcare Benefit (RC62)
- Social assistance and worker's compensation (T5007)
- RRSP and RIF income (T4RSP, T4RIF)
- Any other tax slips

RECEIPTS

- Charitable donations
- RRSP contributions
- Medical expenses
- Children's fitness and arts expenses
- Childcare expenses
- Student loan interest
- Professional or union dues (not included on T4)
- Moving expenses (if moving for school or work)
- School supply expenses (teacher)
- Employment expenses & form T2200
- Exam fees for professional designations
- Rent or property tax
- Support payments received or paid (child, spouse or common-law partner)

OTHER INFORMATION

- Dependants
 - › SIN (if applicable)
 - › Net Income
 - › Date of Birth
- Spouse (If filing separately)
 - › SIN
 - › Net Income
 - › Date of Birth
- Homebuyer's Plan or Lifelong Learning Plan (RRSP Withdrawals)
- VOID cheque or Direct Deposit information (to set up direct deposit with CRA)