



Tax checklist

Make sure you get every tax credit and deduction you're entitled to by keeping all the receipts and income records you need. Here's a handy checklist:

Slips

Most common:

- T4 slips (Employment income; any other income)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)

You might also have:

- Retirement income (T4 RSP, T4 RIF)
- Employment insurance benefits (T4A or T4E)
- Interest, dividends, and mutual funds income (T3, T5, T5008)
- Social assistance payments (T5007)
- Worker's compensation benefits (T5007)
- Advance Canada Workers Benefit (CWB) payments (RC210)
- Foreign pension income
- First Home Savings Account Statement (T4FHSA)

Other documentation

Most common:

- Any change of marital status or address
- Notice of Assessment/Reassessment
- Canada Revenue Agency (CRA) correspondence

You might also have:

- Sale of principal residence—lawyer's statements of sale and purchase
- Sale or deemed sale of stocks, bonds, or real estate
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer firefighters certification
- Search and Rescue volunteer certification

Receipts

Most Common:

- RRSP contribution receipts
- Rent paid receipts
- Medical expenses
 - for each family member including any dependent eg. a parent which may live elsewhere but you help to support
- Statement of prescriptions from pharmacy (per patient) for each pharmacy used
- Out of town medical appointments mileage records
- Hearing aids
- Dental
- Vision/eyeglasses
- Support for a child, spouse, or common-law partner
- Home renovations (seniors and people with disabilities)

You might also have:

- T2202 Tuition and Enrollment Certificate
- Charitable or political donations
- Multigenerational home renovation tax credit
- Child care expenses
- Professional or union dues
- Tool expenses
- Carrying charges and interest expenses
- Adoption expenses
- Moving expenses
- Labour Mobility Deduction for Tradespeople
- Interest paid on student loans

Exams for professional certification