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Income Tax Checklist

Our goal is to make sure you get every tax credit and deduction you're entitled to.

Here's a handy checklist to help get you started:

Slips

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Tuition / education receipts (T2202A)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- All other information slips
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Receipts

- RRSP Contribution Receipts
- Child / Spousal support payments
- Professional or union dues
- Tool Expenses
(tradespersons/apprentice mechanics)
- Medical expenses
- Charitable donation
- Political contributions
- Child care expenses
- Adoption expenses
- Children's arts / fitness
- Moving expenses
- Interest paid on student loans
- Carrying charges & Interest expenses
- Property tax bill or Rent receipts
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Other documents

- Notice of Assessment / Reassessment
- Canada Revenue Agency correspondence
- Sales or deemed sale of stocks, bonds or real estate
- Northern residents deductions receipts
- Office-in-home expenses
- Rental income & Expenses
- Business, farm or fishing income & expenses
- Automobile travel expenses & mileage Logbook
- Disability Tax Credit Certificate
- T2200 (Declaration of Conditions of Employment)
- Volunteer Firefighters certification
- Search & Rescue volunteers certification
- Custody Arrangement documentation
- Sale of Principal Residence (Need, Year property was purchased, Street address, and Sales information).