

Start preparing early for the best success!

*This is not a comprehensive list. Not all items will apply to every individual, check what is relevant to you.

Income:

CRA Assessments:

- Last Year's CRA Notice of Assessment (*important*)
- Instalment Payments

Slips:

- T4 Slips (Employment Income - T4, T4A, T4PS)
- T4E (Employment Insurance Benefits)
- T5007 (Workers Compensation/ Social Assistance)
- T5018 (Statement of Contract Payments)

Other Income:

- Rental Income and expenses
- Self-Employment income and expenses
- Foreign Income
- Covid-19 Benefits

Investments:

- T3 (Trusts and Mutual Funds)
- T5 (Other Investments)
- T5008 (Security Transactions)
- T5013 (Partnership Income)
- Trading Summaries from Brokers

Pension Income:

- T4A
- T4A OAS (Old Age Security)
- T4A P (Canada Pension)
- T4RIF (For withdrawals)
- T4RSP (For withdrawals)

Deductions and Credits:

Receipts :

- RRSP contribution receipts
- Medical Expenses
- Donations

Child related:

- Child care receipts
- Adoption expenses
- Support payments received/paid

Disability related:

- Disability tax credit (for self)
- Care-giver/disability (for someone else)

Student related:

- T2202A (Tuition/education)
- Student loan interest slips

Small businesses /Rental related:

- Income & expenses for the year
- In-home office expenses

Employment related:

- T2200 + expenses (Conditions of Employment)
- Moving expenses (For new Employment)
- Union/professional dues
- Examination fees for professional designations

Other:

- Sale of principal residence
- New home buyer
- Municipal Property Tax Bill and/or Rent Receipts
- Receipts of interest paid on investment loans
- Spousal support received/paid