



Please read the checklist below and send us the forms/documents that apply to your tax situation.

Personal Information

- Social Insurance Number (**SIN**)
- Date of birth
- Information about spouse/common-law partner
- Information about dependents
- Spouse and/or child net income amounts

Income

- Employment income (**T4**)
- Self-employed business income (**T2125, T5013, T4A**)
- Interest, dividends, mutual funds (**T3, T5, T5008**)
- Rental income and expenses (**T776**)
- Old Age Security and CPP benefits (**T4A-OAS, T4A-P**)
- Pension and annuity income (**T4A**)
- RRSP and RIF income (**T4RSP, T4RIF**)
- Employment insurance benefits (**T4E**)
- COVID-19 benefits received (**T4A**)
- Social assistance payments (**T5007**)
- Workers' compensation benefits (**T5007**)
- Other income not reported on a slip (e.g., tips)
- RL-1 Employment and other income (QC only))

Other Information

- Sale of principal residence
- Sale or deemed sale of stocks, bonds or real estate
- RRSP deduction limit and unused amounts



- Tuition carry-forward amounts
- Loss carry-forward amounts
- Other carry forward amounts (donations, etc.)
- Tuition transfer amount from spouse or child
- Last year's tax return
- Notice of Assessment from last year's return
- Total amount of instalment payments made to the CRA
- Other CRA correspondence

Receipts

- RRSP contributions
- Employment expenses (**T2200 signed by employer**)
- Work-from-home expenses due to COVID-19 (**T2200S**)
- Tool expenses
- Union dues not included on your T4 slip
- Exams for professional certification
- Teacher's school supplies
- Childcare expenses
- Support payments paid or received
- Adoption expenses
- Disability tax credit for self or dependents
- Medical expenses
- Personal attendant/facility care expenses
- Charitable donations
- Northern residents deduction
- Digital News subscription expenses
- Political contributions
- Moving expenses
- Home accessibility expenses
- Home Buyers' Amount
- Tuition expenses
- Student loan interest amounts
- Tax-exempt scholarships

