



Canada Tax Checklist

Personal Information

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

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

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)

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.)

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