

Practical Tax Checklist

Before you start filling out your taxes, make sure you have all the required documents, statements, and receipts.

Essential Documents

- ☐ Notice of Assessment/Reassessment
 - ☐ CRA and Revenu Québec Correspondence
 - ☐ T4 - Employment Income
 - ☐ T4E - Employment Insurance Benefits
 - ☐ T4A, T4E - COVID-19 Support Payments or Repayments
 - ☐ T3/RL-16, T5/RL-3, T5008/RL-18 - Interest, Dividends, Mutual Funds
 - ☐ T2202 - Tuition and Enrollment Certificate
 - ☐ T4A(OAS), T4A(P)/RL-2 - Old Age Security and CPP/QPP Benefits
 - ☐ T4A/RL-2 - Other Pensions and Annuities
 - ☐ RRSP Contributions
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Deductible Expenses & Tax Credits

- ☐ Medical Expenses
- ☐ Childcare Expenses
- ☐ Home Office Expenses
- ☐ Union or Professional Dues
- ☐ Moving Expenses
- ☐ Interest Paid on Student Loans
- ☐ Charitable Donations
- ☐ Political Contributions
- ☐ Tool Expenses (Tradespersons and Apprentice Mechanics)
- ☐ Tradesperson Mobility Deduction
- ☐ Home Renovations (Seniors and Persons with Disabilities)

- ☐ Multigenerational Home Renovation Tax Credit
 - ☐ Professional Certification Exam Fees
 - ☐ Digital News Subscription Fees
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Income & Capital Gains

- ☐ Sale of Principal Residence
 - ☐ Sale or Deemed Disposition of Property, Stocks, or Bonds
 - ☐ Rental Income and Expenses Record
 - ☐ Business, Farming, or Fishing Income/Expenses
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Specific Documents

- ☐ Vehicle Logbook and Travel Expenses
- ☐ Disability Tax Credit Certificate
- ☐ Declaration of Employment Conditions
- ☐ Volunteer Firefighter Certificate
- ☐ Search and Rescue Volunteer Certificate
- ☐ Written Certification for Eligible Educator School Supplies
- ☐ Canada Workers Benefit Advance Payments
- ☐ First Home Savings Account (FHSA) Statement
- ☐ Social Assistance Payments
- ☐ Workers' Compensation Benefits
- ☐ Other Tax Slips