Canadian tax checklist

We want to make sure you get every tax credit and deduction you're entitled to.

So, before you get started on your taxes, make sure you have all the receipts and income records you need.

Here's a handy checklist:

☐ **Notice of Assessment/Reassessment** (most important to bring!)
If you have your most recent Notice of Assessment (NOA), please bring it with you as it is very helpful for filing your taxes. If you don't have your NOA, no problem - we can still file your taxes for you. Please bring the following items.

Slips

☐ T4 slips (Employment income)
☐ Employment insurance benefits (T4A or T4E)
☐ Repayments of COVID-19 benefits
☐ Interest, dividends, mutual funds (T3, T5, T5008)
☐ T2202 Tuition and Enrollment Certificate
☐ Old Age Security and CPP benefits (T4A-OAS, T4AP)
☐ Other pensions and annuities (T4A)
☐ Social assistance payments (T5007)
☐ Workers' compensation benefits (T5007)
☐ Advance Canada Workers Benefit (CWB) payments (RC210)
☐ All other information slips
☐ T4FHSA First Home Savings Account Statement

Receipts

☐ RRSP contribution receipts
☐ Support for a child, spouse or common-law partner
☐ Professional or union dues
☐ Tool expenses
(Tradespersons & apprentice mechanics)
☐ Office-in-home expenses
☐ Other employment expenses
☐ Teacher's school supplies
☐ Medical expenses
☐ Home renovations (seniors and disabled)
☐ Multigenerational home renovation tax credit
☐ Charitable donations

Receipts (continued)

☐ Political contributions
☐ Child care expenses
☐ Adoption expenses
☐ Moving expenses
☐ Interest paid on student loans
☐ Carrying charges and interest expenses
☐ Exams for professional certification
☐ Labour Mobility Deduction for Tradespeople

Other documentation

☐ Canada Revenue Agency correspondence
☐ Sale of principal residence
☐ Sale or deemed sale of stocks, bonds or real estate
☐ Northern residents deductions receipts
☐ Rental income and expense receipts
☐ Business, farm or fishing income/expenses
☐ Automobile/Travel logbook and expenses
☐ Disability Tax Credit Certificate
☐ Declaration of Conditions of Employment (T2200)
☐ Volunteer Firefighters certification
☐ Search and Rescue volunteers certification
☐ Written certification for eligible educator school supplies
☐ Record of cryptocurrency transactions
☐ _____

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Have a CRA My Account? Please check to see if you can sign in before your appointment. If you don't have one or can't sign in, no worries, we can still do your tax return.