

**Use this checklist to organize your personal tax papers**

- Details on any changes to your family info (marital status, dependents, changes in address etc.)
- T4 (employment income)
- T4A (pension, annuity and similar income, OAS, CPP, CRB, CRSB, CRCB)
- T4RIF (receipts from RRIF)
- T4RSP (receipts from RRSP)
- T4E (E.I. benefits including maternity benefits)
- T5 (interest and taxable dividends)
- T5008 (dispositions of securities)
- T101 and T102 (resource expenses flow through shares)
- T3 (statement of income from mutual funds, trusts and income trust units)
- T2200 (declaration of conditions of employment signed by employer)
- T2200S (declaration of conditions of employment signed by employer- Working at Home Due to COVID-19)
- T2222 (Northern resident deduction)
- T5013 (statement of partnership income/loss)
- Investments (non-registered accounts). A list of all investments purchased and sold along with applicable details and management fees paid. If applicable, please request this information along with a capital gain/loss trading summary.
- Charitable donation receipts
- RRSP contribution receipts, RRSP Home Buyers Plan details, and receipts from RRSP Life-time Learning Program withdrawals
- Details of foreign investments held personally
- Union or professional dues
- Interest expenses (amount paid and details of loans for business or investment purposes)
- T2202 (student tuition receipts) and details of any student loan interest paid
- Medical receipts and receipts for the Home Accessibility Tax Credit
- Political contribution receipts
- Tax installment receipts/statement from Canada Revenue Agency
- Prior year's Notice of (re)assessment from Canada Revenue Agency
- Childcare expense receipts
- Employment expense information (meals, home office, etc)
- Self-employment information and related GST information
- Summary of rental properties, receipts, and expenses- by property
- Moving expenses and details
- Details of alimony or maintenance received or paid
- Details of all real estate acquisitions and dispositions during the year
- Receipts for the Early Childhood Educator School Supply Tax Credit (teachers only)
- Receipts for the Digital News Subscription Credit
- Details for any dependents for which you are claiming personal tax credits (caregiver, disability, eligible dependent)

*This handout is for information purposes to assist with preparing your tax return. Please contact your accountant to determine what information is required for your own individual tax return.*