

Tax checklist

Every credit and deduction counts, so let's not leave any behind.

A few minutes gathering your paperwork now means a simpler, faster return later.

What to gather:

☐ **Last year's notices of assessment** (put these first)

From the CRA and, if you live in Quebec, Revenu Québec. They show your RRSP limit, carry-forwards and balances. Can't find them? That's okay, your return can still be prepared. Just move on to the list below.

Income slips

- ☐ Employment income (T4/RL-1)
- ☐ Employment insurance (T4E) and QPIP benefits (RL-6)
- ☐ Interest, dividends, mutual funds (T3/RL-16, T5/RL-3, T5008/RL-18)
- ☐ Social assistance payments (T5007/RL-5)
- ☐ Workers' compensation benefits (T5007/RL-5)
- ☐ Advance payments of the Canada Workers Benefit (CWB) (RC210)
- ☐ T4FHSA, First Home Savings Account statement
- ☐ Old Age Security and CPP/QPP benefits (T4A(OAS), T4A(P)/RL-2)
- ☐ Other pensions and annuities (T4A/RL-2)
- ☐ All other slips and statements that apply to your situation

Receipts and deductions

- ☐ RRSP contributions
- ☐ FHSA contributions
- ☐ Childcare expenses
- ☐ Physical and arts activity expenses (Quebec only)
- ☐ Medical expenses
- ☐ Charitable donations

Receipts and deductions (continued)

- ☐ Political contributions
- ☐ Union or professional dues
- ☐ Moving expenses
- ☐ Interest paid on student loans
- ☐ Tuition receipt (T2202 / RL-8)
- ☐ Home office expenses
- ☐ Other employment expenses
- ☐ Support payments made (spouse, common-law partner or child)
- ☐ School supplies (eligible teachers and early childhood educators)
- ☐ Tool expenses (tradespeople and apprentice mechanics)
- ☐ Labour mobility deduction for tradespeople

Other documents

- ☐ Sale of a principal residence or real estate property
- ☐ Rental income and expenses
- ☐ Business or self-employment income and expenses
- ☐ Vehicle logbook and expenses
- ☐ T2200 / TP-64.3, Conditions of employment and expenses
- ☐ Disability tax credit certificate

This checklist is provided for information only and does not replace professional advice. A MyTaxly tax specialist reviews your file to make sure nothing is missed.