

# Canadian Tax Checklist

*We want to make sure to OPTIMIZE YOUR TAX REFUND BY CLAIMING THE MAXIMUM DEDUCTIONS YOU ARE ENTITLED*

## Slips

- ✓ T4 slips (Employment income)
- ✓ Employment insurance benefits (T4E)
- ✓ Interest, dividends, mutual funds (T3, T5, T5008)
- ✓ Tuition / education receipts (T2202A)
- ✓ Universal Child Care Benefit (RC62)
- ✓ Old Age Security and CPP benefits (T4A-OAS, T4AP)
- ✓ Other pensions and annuities (T4A)
- ✓ Social assistance payments (T5007)
- ✓ Workers' compensation benefits (T5007)
- ✓ All other information slips

## Other documentation

- ✓ Notice of Assessment/Reassessment
- ✓ Canada Revenue Agency correspondence
- ✓ 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
- ✓ Custody Arrangement documentation

## Receipts

- ✓ RRSP contribution receipts
- ✓ Support for a child, spouse or common-law partner
- ✓ Professional or union dues
- ✓ Tool expenses
- ✓ (Tradespersons & apprentice mechanics)
- ✓ Medical expenses
- ✓ Transit pass receipts
- ✓ Charitable donations
- ✓ Political contributions
- ✓ Childcare expenses
- ✓ Adoption expenses
- ✓ Children's arts and sports programs
- ✓ Moving expenses
- ✓ Interest paid on student loans
- ✓ Carrying charges and interest expenses
- ✓ Office - in-home expenses
- ✓ Exams for professional certification



[krami@rogers.com](mailto:krami@rogers.com)



TEL: 1(613) 852-4545



FAX: 1(613) 680- 6869