

# Tax Return Checklist

**CANACCORD** Genuity  
Wealth Management

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Staying organized during tax season is critical to ensure you aren't missing opportunities and get every tax credit and deduction you are entitled to.

Before you file, here is a helpful checklist to keep you on track:

## TAX SLIPS

*Here are some of the federal tax slips you may receive by the end of February:*

- 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

## RECEIPTS

*To back up your claims for deductions and credits, make sure you have receipts for:*

- RRSP contribution receipts
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses
- Medical expenses
- Transit pass receipts
- Charitable donations
- Political contributions
- Child care 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



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## CANADA REVENUE AGENCY INFORMATION

- Last year's tax return
- Last year's Notice of Assessment
- Tax instalment payments
- Any reassessments and other correspondence
- NETFILE access code

## ADDITIONAL CONSIDERATIONS

You may require additional records if you answer 'yes' to any of the following questions:

- Do you have small business income/expenses?
- Do you work on commission?
- Did you sell stocks, bonds or real estate?
- Do you use space in your home to work?
- Do you have farm or fishing income/expenses?
- Do you have rental income/expenses?
- Are you a volunteer firefighter?
- Are you eligible for the Disability Tax Credit?
- Are you a Northern resident?

Please note that this checklist is meant to act as a guideline to keep you organized during tax season, but individuals may need additional documentation. Individuals should always consult with a professional to ensure the exact documentation for their specific tax needs.

This checklist was provided to you by:

