

TAX DOCUMENT CHECKLIST



Employment & Income

T4 - Employment Income
T4A - Pension, Annuity, Other
T4E - Employment Insurance
T4A(OAS) - Old Age Security
Alimony/Child support
Scholarships/Bursarys
Tips, Commissions, Inheritance, etc

T4A(P) - CPP Benefits
T5007 - Social Assistance / Workers Comp
T4RSP / T4RIF - RRSP or RRIF Income
T3 / T5 - Investment Income
Disability

Self-Employment

Revenue / Sales records
Expense receipts
Tool Expenses, training,

GST
Vehicle log (if applicable)
Home office expenses

Rental Income

Rental income statement
Rental expenses statement
Rental GST

Mortgage interest / property tax
Repair & maintenance receipts
Insurance / utilities

Deductions & Credits

RRSP contribution receipts
Medical expenses
Charitable donation receipts
Childcare receipts

Tuition (T2202)
Moving expenses
Union / professional dues
Student loan interest

Other

Capital gains / losses (stocks, crypto)
Foreign income / assets (T1135)

Sale of property documents
First Time Home Buyers Savings

New Client Documents

Access to CRA Account
Prior year taxes

Canadian Citizenship, Registered with Elections Canada
Any changes from last years taxes

Sold Primary Residence

Date of Sale:
Sale Price:
Address:

Sold Rental Property

Date of Sale:
Sale Price:
Address: