



Tax Preparation Checklist

What do you need to file your taxes? Use this checklist to ensure you're providing your tax specialist everything they need. You won't want to miss out on eligible tax-savings.

INCOME SLIPS

Here are some of the federal tax slips you may receive. Most will arrive by mid March.

- ☐ T4 - Employment income
- ☐ T4A (OAS) - Old Age Security
- ☐ T4A (P) - Canada Pension Plan or Quebec Pension Plan benefit
- ☐ T4A - Other sources of income, including pensions, annuities, payments from a Registered Education Savings Plan, self-employment commissions, scholarships and more.
- ☐ T4E - Employment Insurance income
- ☐ T4RSP - Registered Retirement Savings Plan (RRSP) income
- ☐ T4RIF - Registered Retirement Income Fund (RRIF) income
- ☐ T3 - Allocations or distributions from trusts (including segregated funds, mutual funds and exchange-traded funds)
- ☐ T5 - Investment income, including interest from bank accounts
- ☐ T5007 - Workers' compensation/social assistance benefit
- ☐ T5008 - Statement of Securities Transactions
- ☐ T5013 - Partnership income
- ☐ T776 - Rental Income and Expenses

RECEIPTS

Deductions and credits can significantly reduce your tax bill. To back up your claims, you will need your supporting documentation:

- ☐ RRSP contributions
- ☐ First Home Savings Account (FHSA) Contributions
- ☐ Investment expenses
- ☐ Investment Loan interest
- ☐ Rental income and expenses
- ☐ Moving expenses
- ☐ Rent/property tax (in certain provinces)
- ☐ Medical expenses
- ☐ Charitable donations
- ☐ Political donations
- ☐ Child care expenses
- ☐ Adoption expenses
- ☐ Spousal support
- ☐ Tuition expenses
- ☐ Student loan interest
- ☐ Employment Expenses (T2200 signed by employer)
- ☐ Tool expenses (for tradespeople)
- ☐ Professional or union dues
- ☐ Professional certification exams
- ☐ Car/travel logbook and expenses
- ☐ Expenses for disabled person's attendant
- ☐ Home Buyers Plan (HBP) Withdrawals
- ☐ Digital Newspaper subscriptions
- ☐ Any other deductions or credits

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OTHER INFORMATION

- ☐ Notice of Assessment/Reassessment (*new clients only*)
- ☐ CRA correspondence
- ☐ Sale of principal residence
- ☐ Sale or deemed sale of stocks, bonds or real estate
- ☐ Northern residents deductions receipts
- ☐ Business, farm or fishing income/expenses
- ☐ Disability Tax Credit Certificate (DTC)
- ☐ Volunteer Firefighters Certification (VFA)
- ☐ Search and Rescue Volunteers (SARVA) Certification
- ☐ Written certification for eligible educator school supplies
- ☐ Record of cryptocurrency transactions.
- ☐ Eligible Caregiver
- ☐ Eligible for the Multi-Generational Home Improvement Tax Credit

Tax Preparation for T1 General Individual Returns

Please answer the following questions for your Income Tax and Benefit Return:

	YES	NO
1. Do you want your email address included on your return and provided to CRA?	☐	☐
2. Can CRA share your contact information with Elections Canada?	☐	☐
3. Did you own foreign property at anytime in 2024 with a total cost of more than \$100,000?	☐	☐
4. Do you own your home?	☐	☐
5. Did you sell your home or other real estate property last year?	☐	☐
6. Have you moved since your last tax filing?	☐	☐
7. Do you authorize CRA to provide your name, email address and postal code to BC Transplant to contact or send you information about organ and tissue donation?	☐	☐

This checklist is not intended to be a complete list of all the possible documentation that you may need. Individuals should seek the advice of a professional in order to ensure they have the information and documentation appropriate to their specific situation.