

**A Checklist for next year's income tax preparation:**

**Income Slips**

T4	Employment Income
T4A	CERB Payments
T4A	Certain Scholarships
T4A	Other Pensions and Annuities
T4A(OAS)	Old Age Security
T4AP(CPP)	Canada Pension Plan
T4E	Unemployment Insurance (EI)
T4RSP	Retirement Savings Plan
T4RIF	Retirement Income Fund
T3	Investment Income from Mutual Funds, REITS, ETFs (T3's may be mailed to you as late as March 31)
T5	Interest and Dividends
T5007	Social Assistance and Worker's Compensation Payments
T5008	Income from Securities Transactions
T2200	Declaration of Conditions of Employment – (Advise if working from home due to COVID)
T2202A	Tuition, Education and Textbook Amounts Certificate

**Receipts**

-Adoption Expenses	-Moving Expenses Related to Employment (if move is greater than 40 Kms.)
-Attendant/Nursing Home Care Expenses (with Disability)	-Ontario Accommodation Receipts for new "Staycation" Credit
-Automobile/Travel Logbook and Expenses	-Political Donation Receipts
-Business, Farm or Fishing Income/Expenses	-Prior year's Notice of Assessment from Canada Revenue Agency
-Canada Revenue Agency Correspondence	-Property Taxes/Rent Receipts
-Charitable Donations	-Rental Income and Expense Records
-Child Care/Child Support Payments	-RRSP Contributions
-Disability Tax Credit Certificate	-Spousal Support Payments (paid/received)
-First Time Home Buyers Credit	-Student Loan Interest
-Foreign Assets/Property over \$100,000 as there are extra filing requirements	-Tax Instalment Payments made
-Home Accessibility and Safety Renovations (incurred by those 65 and older or with disability)	-Teaching/Classroom supplies for Teachers
-Information on Capital Gains in the year on sales of Investments, Stocks or Real Estate, Realized Gain or Loss Report from your Investment Advisor	-Transit Passes or Receipts (seniors only)
-Medical Expenses (including travel if over 40 kms.)	-Union and Professional Fees
	-Volunteer Firefighters Certification

Canadian Citizen? Y / N

Do you authorize CRA to provide name, address and date of birth to Elections Canada for voters' registry? Y / N

Did you sell your principal residence in the year? Y / N

Do you hold Foreign assets or property (cash, investments, rental property) with a cost over \$100,000? Y / N

**Please advise us of any changes in the following:**

**New Dependent(s):** Full Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

**Change in Marital Status:** Details \_\_\_\_\_ Date of Change \_\_\_\_\_

**Change in Address:** \_\_\_\_\_

**Change in Telephone Number:** \_\_\_\_\_