



Tax Prep Checklist

Use this handy checklist to organize all the information you'll need to do your income taxes. With TurboTax, we'll help you get back every dollar you deserve!

If you've changed your name, marital status or moved since you last filed your return, then your first step is to ensure your info is correct with the Canada Revenue Agency (CRA). Many of these necessary updates can be made instantly online for CRA MyAccount holders.

Other changes, such as a name change of both your first and last names, requires you to contact CRA directly.

CHECKLIST

- Social Insurance Numbers for you, your spouse/partner, and any dependants (if applicable)
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- Dates of birth for family members
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- Net income amounts for your spouse/partner and any dependants for whom you're claiming credits such as the Canada Caregiver Amount
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- If you plan to accept a tuition transfer, you'll need a copy of the student's return
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- The total amount of instalment payments made to CRA
-

INCOME - T Slips

- T3, Statement of Trust Income Allocations and Designations
- T4, Statement of Remuneration Paid
- T4A, Statement of Pension, Retirement, Annuity, and other income
- T4A (OAS), Statement of Old Age Security
- T4A (P), Statement of Canada Pension Plan Benefits
- T4E, Statement of Employment Insurance and other benefits
- T4RSP, Statement of RRSP Income
- T5007, Statement of Benefits
- T5013, Statement of Partnership Income

- T5013A, Statement of Partnership Income for Tax Shelters and Renounced Resource Expenses
- RC210, Working Income Tax Benefit Advance Payments Statement

OTHER INCOME

- Tips and gratuities
- Rental income
- Self-employment income including fishing, farming, small businesses, freelance work, and contractors
- Support payments received
- Capital Gains including the sale of your principal residence

EXPENSES & CREDITS

- Medical expenses- If you're claiming any medical expenses for other dependant family members (other than you, your spouse/partner, and your minor children), then the dependant's net income is required
- Tuition slips (T2202A, TL11A, TL11B, T111C)
Tuition amounts received via transfer (you'll need a few numbers from the transferor's return)
- Unused tuition, education and textbook amounts from previous years
- Student loan interest amounts
- Home accessibility expenses
- Adoption expenses
- Personal attendant care expenses
- Charitable donations
- Receipts for classroom/school supplies (this is for teachers and early childhood educators)

Depending on your province of residence, you may also need a few other amounts for certain provincial credits such as:

- Rent receipts
- Property tax amounts
- RL Slips (Quebec)
- Seniors' activity receipts

DEDUCTIONS

- Receipts for childcare expenses
- Union dues, which are not included on your T4 slip
Moving expenses
- Form T2200 (completed by your employer) to claim employment expenses
- Amounts for carrying charges and interest expenses related to your investments (this includes fees for managing your investments)
- RRSP contributions, Home Buyers' Plan, and Lifelong Learning Plan repayment amounts
- Support payments made
- Unused losses