Income tax checklist

Income tax checklist: new customers

Bring or send us everything that applies to you. This helps us complete your return and claim every credit you're entitled to.

1 Personal information

- [ ] Full legal name
- [ ] Social Insurance Number
- [ ] Date of birth
- [ ] Marital status and your spouse's or partner's information (if applicable)

2 Income documents

- [ ] T4 slip (employment income)
- [ ] T4A slip (pension or other income)
- [ ] T5 slip (investment income)
- [ ] T3 slip (trust income)
- [ ] T5007 slip (social assistance payments)
- [ ] Any other relevant income documents

3 Deductions and credits

- [ ] Receipts for eligible medical expenses
- [ ] Receipts for charitable donations
- [ ] Education receipts, including T2202 for tuition and textbooks
- [ ] RRSP contribution receipts
- [ ] Moving expense receipts, if moving into or out of the province for work or school
- [ ] Statements of rent paid

  Only one person per household may claim rent.
- [ ] Medical, dental and prescription receipts

- [ ] Childcare and daycare receipts
- [ ] Fitness fee receipts
- [ ] Arts and cultural fee receipts
- [ ] Lunch program receipts

4 Employment expenses (if applicable)

- [ ] T2200 Declaration of Conditions of Employment, completed by your employer
- [ ] Receipts for work-related expenses, such as vehicle expenses and supplies

5 Business and self-employment (if applicable)

- [ ] Income and expense records
- [ ] Business expense receipts
- [ ] Statement of Business Activities

6 Rental income (if applicable)

- [ ] Rental income and expense records
- [ ] Rental property details

7 Capital gains and losses

- [ ] Records of purchases and sales of investments or properties
- [ ] Receipts for property improvements

8 Bank information

- [ ] Bank account details for direct deposit (optional; otherwise your refund is mailed as a cheque)

Note: Questions about what to bring? Email us at info@masterpeacebookkeeping.ca or send us a message at masterpeacebookkeeping.ca.