

Personal Tax Checklist

A general list of receipts and income records that may apply to you

Slips

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Tuition / education receipts (T2202A)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- All other information slips

Other Documentation

- Notice of Assessment/Reassessment
- Canada Revenue Agency correspondence
- Sale of principal residence
- Sale or deemed sale of stocks, bonds or real estate
- Northern residents deductions receipts
- Rental income and expense receipts
- Business, farm or fishing income/expenses
- Automobile / Travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification
- Search and Rescue volunteers certification
- Written certification for eligible educator school supplies

Receipts

- RRSP contribution receipts
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons & apprentice mechanics)
- Other employment expenses
- Teacher's school supplies
- Medical expenses
- Home renovations (seniors and disabled)
- Charitable donations
- Political contributions
- Child care expenses
- Adoption expenses
- Moving expenses
- Interest paid on student loans
- Carrying charges and interest expenses
- Office - in-home expenses
- Exams for professional certification



**Suite 227, 333 Aspen
Glen Landing SW
Calgary, AB T3H 0N6
(587) 349-7325
info@fcpcgroup.ca**