



# TAX DOCUMENT CHECKLIST

## ✓ PERSONAL INFORMATION

- Social Insurance Number (SIN)
- Date of birth
- Current address & marital status
- Direct deposit information (optional)

## ✓ INCOME SLIPS

- T4 – Employment income
- T4A – Pension, self-employment, or other income
- T5 – Investment income
- T3 – Trust income
- T5007 – Social assistance / workers' compensation
- T4E – Employment Insurance
- T4RSP / T4RIF – RRSP or retirement income
- T5018 – Subcontractor payments (if applicable)

## ✓ DEDUCTIONS & CREDITS

- RRSP contribution receipts
- Childcare receipts
- Medical expenses
- Tuition (T2202)
- Charitable donations
- Union/professional dues
- Moving expenses (if eligible)
- Disability tax credit documents

## ✓ OTHER

- Last year's Notice of Assessment
- Property tax / rent receipts (provincial credits)
- Capital gains/loss statements
- Crypto transaction summary (if applicable)