

Basic Checklist		
Income		
Taxpayer	Spouse	Documentation
<input type="checkbox"/>	<input type="checkbox"/>	I did NOT have any income in this tax year.
<input type="checkbox"/>	<input type="checkbox"/>	Employment income T4, and RL-1 if you are a Quebec resident
<input type="checkbox"/>	<input type="checkbox"/>	Employment insurance benefits T4E
<input type="checkbox"/>	<input type="checkbox"/>	Registered retirement income T4RIF
<input type="checkbox"/>	<input type="checkbox"/>	RRSP income T4RSP
<input type="checkbox"/>	<input type="checkbox"/>	CPP/QPP benefits T4A(P)
<input type="checkbox"/>	<input type="checkbox"/>	Old age security T4A(OAS)
<input type="checkbox"/>	<input type="checkbox"/>	Other non-self-employed T4A For example: CERB, CRB, CRCB, CRSB, CESB, scholarship etc.
<input type="checkbox"/>	<input type="checkbox"/>	Trust income T3 For example: mutual fund etc.
<input type="checkbox"/>	<input type="checkbox"/>	Investment income T5
<input type="checkbox"/>	<input type="checkbox"/>	Social assistance payments T5007
Deduction and Tax Credit		
Taxpayer	Spouse	Documentation
<input type="checkbox"/>	<input type="checkbox"/>	Tuition T2202A, and RL-8 if you are a Quebec resident
<input type="checkbox"/>	<input type="checkbox"/>	Student loan interest
<input type="checkbox"/>	<input type="checkbox"/>	Charitable donation receipts
<input type="checkbox"/>	<input type="checkbox"/>	Medical receipts (if you have a total expense of at least 3% of your net income)
<input type="checkbox"/>	<input type="checkbox"/>	Rental receipts, or RL-31 if you are a Quebec resident
<input type="checkbox"/>	<input type="checkbox"/>	Property tax bills

Additional Checklist		
Income		
Taxpayer	Spouse	Documentation
<input type="checkbox"/>	<input type="checkbox"/>	I did NOT have any of the following income, deduction, tax credit, or situation in the tax year.
<input type="checkbox"/>	<input type="checkbox"/>	Stock transactions T5008
<input type="checkbox"/>	<input type="checkbox"/>	Self-Employed business income
<input type="checkbox"/>	<input type="checkbox"/>	Rental income
<input type="checkbox"/>	<input type="checkbox"/>	World /foreign income
Deduction and Tax Credit		
Taxpayer	Spouse	Documentation
<input type="checkbox"/>	<input type="checkbox"/>	RRSP contribution receipts
<input type="checkbox"/>	<input type="checkbox"/>	FHSA contribution receipts
<input type="checkbox"/>	<input type="checkbox"/>	Union, professional, or like dues
<input type="checkbox"/>	<input type="checkbox"/>	Childcare expense receipts
<input type="checkbox"/>	<input type="checkbox"/>	Digital news subscription receipts
<input type="checkbox"/>	<input type="checkbox"/>	Home buyer's amount: Have you (or your spouse) acquired your first home?
<input type="checkbox"/>	<input type="checkbox"/>	Home renovations (seniors and disabled)
<input type="checkbox"/>	<input type="checkbox"/>	Disability amount: Have you been approved for the disability tax credit (DTC)?
<input type="checkbox"/>	<input type="checkbox"/>	Caregiver credit: Did you support a spouse or dependent with impairment?
<input type="checkbox"/>	<input type="checkbox"/>	Spousal support payments
<input type="checkbox"/>	<input type="checkbox"/>	Carrying charge: Did you have any expenses to earn investment income? For example: investment advice fees, interest on money borrowed to invest
<input type="checkbox"/>	<input type="checkbox"/>	Employment expense: Did you receive T2200 or T777 from your employer?
<input type="checkbox"/>	<input type="checkbox"/>	Moving expense

<b>Let us know if you have the any of following</b>		
<b>Taxpayer</b>	<b>Spouse</b>	<b>Documentation</b>
<input type="checkbox"/>	<input type="checkbox"/>	Property disposition /acquisition: Did you sell or buy any properties in this year?
<input type="checkbox"/>	<input type="checkbox"/>	Property change in use (from Residential to Rental, or vice versa)
<input type="checkbox"/>	<input type="checkbox"/>	Foreign properties (total cost over \$100,000) For example: foreign rental property, foreign stock held in Canada banks etc.
<input type="checkbox"/>	<input type="checkbox"/>	Other capital gain / Loss For example: Employee stock option etc.
<b>Notes and Comments</b>		

**Disclaimer:** Please note that this checklist is intended to capture common tax documents and is not all-inclusive. Individual tax situations may necessitate additional documentation to ensure a fully compliant tax filing.

**Declaration:** By submitting this form, you hereby confirm that all information and documents provided are accurate, true, and complete to the best of your knowledge and belief. It is crucial to ensure the integrity and thoroughness of this data, as it directly impacts the accuracy of your tax filing and adherence to CRA regulations. Incomplete or inaccurate information may result in processing delays, audits, or reassessment. You will receive the prepared tax documents for your review and approval prior to our submission to the Canada Revenue Agency (CRA).

Signature (taxpayer)

Date

Signature (spouse)

Date