

2021 Tax Checklist

Slips

- All T4 slips (T4RRIF, T4RSP, T4A, T4E, T4, T4PS)
- All other information slips (Dividends, interest)(T3, T5, T5008)
- RC62 (Universal Child Care Benefit)
- Old Age Security and CPP benefits (T4OAS, T4AP)
- Other pensions and annuities (including foreign)
- T5013 (Partner Income Statement)
- Tuition/Education amounts for qualifying students (T2202)
- COVID-19 relief payments (T4A and/or T4E)

Receipts

- RRSP contribution slip
- Support a child, spouse or common-law partner, along with court order
- Professional fees & Union dues
- Tool expenses (tradespersons & apprentice mechanics)
- Medical expenses (vision, dental, prescription) net of any 3rd party coverage (SIN for home care providers)
*Pharmacy printout is preferred
- Insurance premiums paid for private medical or dental plans incl. medical travel insurance
- Teacher school supplies
- Charitable donations and /or Political contributions
- Child care and/or attendant care expenses with SIN for Nannies/equivalent
- Child summer camp receipts
- Adoption expenses
- Moving expenses (if you moved 40+ KM to a new job or work location)
- Home accessibility renovations (seniors or disabled)
- Digital news subscription
- # of days you worked from home (COVID-19), must be 4 consecutive weeks minimum

Receipts (continued)

- Interest paid on student loans
- Carrying charges and interest expenses on investment loans
- Exams for professional certification
- Office-in-home expenses for self-employed taxpayers

Other Documentation

- Income tax installments made
- Notice of Assessment/Reassessment (2020) & any other CRA correspondence
- Self-Employment income and expenses
- Annual trading summary for 2021, including cost base (realized gains/losses)
- Name, DOB and SIN of any new dependents
- Change in Personal status (single, married, common-law, separated etc.) along with date of change
- Rental income & expense records (rent collected, interest paid, property tax, insurance, etc.)
- Other income, such as tips (alimony)
- 1st time home buyer in 2021? Let us know
- Sold a house in 2021? Let us know
- Business, farm or fishing income & expense records
- Disability Tax Credit Certificate (T2201)
- Declaration of Conditions of Employment (T2200 or T2200S)
- Automobile/Travel Logbooks and/or automobile and travel expenses
- Volunteer Firefighters certification / search and rescue volunteer certification
- Spouse (common law) net income if we aren't preparing their T1
- Written certification for eligible educator school supplies

The above list is intended to capture most of the applicable information. If you have any questions about your personal situation that may not be listed above, we encourage you to let us know so we can interpret your unique situation.