

GETTING YOUR TAXES TOGETHER

USE THE FOLLOWING CHECKLIST TO HELP ENSURE YOU HAVE THE RIGHT INFORMATION TO MAKE THIS TAX SEASON A SMOOTH ONE

GENERAL ITEMS

- DID YOU MAKE TAX INSTALMENT PAYMENTS?
- DETAILS OF FOREIGN PROPERTY HOLDINGS
- ARE YOU A U.S. CITIZEN?
- DO YOU HAVE A TAX FREE SAVINGS ACCOUNT?
- ARE OTHER PEOPLE DEPENDENT UPON YOU BECAUSE OF THEIR AGE OR A DISABILITY?

INCOME

- EMPLOYMENT INCOME (T4)
- PENSION INCOME (T4A,T4A(P),T4RIF,T4RSP)
- US SOCIAL SECURITY
- OTHER FOREIGN INCOME (including PENSION)**
- INVESTMENT INCOME (T5)
- INCOME FROM TRUSTS SUCH AS MUTUAL FUND INVESTMENTS (T3)
- INCOME FROM EMPLOYMENT INSURANCE (T4E)
- INCOME FROM PARTNERSHIPS (T5013)
- WORKERS COMP/SOCIAL ASSISTANCE PAYMENTS (T5007)
- DETAILS OF THE SALE OF SECURITIES SUCH AS STOCKS AND BONDS (GAINS/LOSS REPORT)
- INCOME FROM FOREIGN INVESTMENTS
- SPOUSAL SUPPORT PAYMENTS RECEIVED
- DO YOU RECEIVE TIPS OR GRATUITIES?**
- SELF EMPLOYED INCOME
- RENTAL INCOME

DEDUCTIONS & CREDITS

- RRSP CONTRIBUTIONS - INCLUDE SLIPS FOR CONTRIBUTIONS MADE JAN & FEB 2026**
- MEDICAL, DENTAL, PRESCRIPTION DRUGS, **GET PHARMACY PRESCRIPTION PRINTOUT**
- NURSING HOME EXPENSES
- PYMTS TO A PRIVATE HEALTH INSURANCE
- CHARITABLE DONATIONS
- TUITION FEES (**NEED T2202A FROM SCHOOL**) AND EXAM FEES FOR YOU, OR TRANSFERRED FROM A DEPENDENT CHILD OR GRANDCHILD
- INTEREST PAID ON STUDENT LOANS
- PROFESSIONAL DUES, UNION DUES
- INTEREST ON LOANS USED TO PURCHASE INVESTMENTS
- INVESTMENT MANAGEMENT FEES
- LEGAL FEES (NOT ALL, CALL US TO CONFIRM)
- DETAILS OF PEOPLE YOU SUPPORT AND THEIR MEDICAL STATUS
- CHILD CARE RECEIPTS (FOR CAMP, LIST DATES ATTENDED)
- MOVING EXPENSES IF YOU MOVED 40 KM OR MORE TO BE CLOSER TO WORK/SCHOOL
- PROPERTY TAXES OR RESIDENTIAL RENT PAID AND TO WHOM (RECEIPTS!)
- POLITICAL CONTRIBUTIONS RECEIPTS
- DIGITAL NEWS RECEIPT
- SPOUSAL SUPPORT PAYMENTS PAID
- ADOPTION EXPENSES
- EDUCATOR SUPPLIES
- HOME ACCESSIBILITY EXPENSES (RECEIPTS REQUIRED)
- HOME OFFICE EXPENSES, T2200