

2021 Tax Checklist

You may find this helpful for filing your taxes.

Income/Expenses/Receipts

- Carrying charges and interest expenses
- Charitable donations
- Child care expenses
- Educator school supplies
- Exams for professional certification
- Home renovations (seniors and disabled)
- Interest and dividend payments
- Northern residents deductions
- Medical/Dental expenses
- Moving expenses
- In-home office expenses
- Other employment expenses
 - Travel expenses, vehicle expenses
- Political contributions
- Professional or union dues
- Rental income and expense receipts
- RRSP contribution receipts
- Student loan interest payments
- Support for a child, spouse or common-law partner
- Tool expense for Tradespersons
- Tuition/Education amounts

Slips

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- COVID-19 relief payments (T4A, T4E)
- Interest, dividends, mutual funds, partnership income (T3, T5, T5013)
- T2202 Tuition and Enrollment Certificate
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- RRSP Withdrawal (T4RSP)
- RRIF Withdrawal (T4RIF)

Other Info & Documents:

- Business, farm, fishing income & expense records
- Canada Revenue Agency correspondence
 - Instalments
- Capital gains/losses records (T5008)
- Foreign Property with a cost of \$100,000+ CDN
- Declaration of Conditions of Employment (T2200)
- Disability Tax Credit Certificate (T2201)
- Notice of Assessment/Reassessment
- Sale of principal residence
- Search and Rescue volunteers certification
- Volunteer Firefighters certification

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