

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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