

2024 Tax Checklist

We're here to help you maximize your refund. Use our checklist to help gather your documents.

Tax Slips

- ☐ Employment income (T4) ★
- ☐ Employment insurance benefits (T4E) ★
- ☐ Pension and annuity income (T4A) ★
- ☐ CPP and OAS slips (T4A(P) and T4A(OAS)) ★
- ☐ Investment income (T3, T5, and T5008) ★
- ☐ Tuition (T2202 or TL11) ★
- ☐ Social assistance and worker's comp (T5007) ★
- ☐ RRSP and RIF income (T4RSP, T4RIF) ★
- ☐ Partnership income (T5013)
- ☐ Any other tax slips

Receipts

- ☐ Charitable and political donations
- ☐ RRSP contributions ★
- ☐ Medical expenses
- ☐ Child care expenses
- ☐ Children's fitness and arts expenses (MB, YT)
- ☐ Adoption expenses
- ☐ Student loan interest
- ☐ Professional or union dues (if not included on your T4)
- ☐ Investment advisor fees and interest expenses
- ☐ Moving expenses
- ☐ School supply expenses (teachers)
- ☐ Tools expenses
- ☐ Employment expenses & form T2200
- ☐ Examination fees for professional designations
- ☐ Rent or property tax or hydro (ON, MB)
- ☐ Legal expenses to collect alimony, pension or retiring allowance
- ☐ Home renovation/accessibility expenses (if a senior or eligible for the disability tax credit)
- ☐ Transit passes (Ontario seniors only)

Self Employ/ Business Information

Inhome Office - house bills: utilities, Prop Taxes, Telephone, Insurance, Maintenance and Repairs

Cell Phone – Meal / Entertainment Receipts

Vehicle Bills: Fuel Slips, insurance, maintenance and repairs, travel log

Other Documents

- ☐ Last year's notice of assessment from the CRA
 - ☐ Tuition carry forward amounts ★
 - ☐ RRSP deduction limit and unused amounts ★
 - ☐ Loss carry forward amounts ★
- ☐ Other CRA correspondence ☐ Last year's tax return (helpful for first time users)
- ☐ Instalment payment amounts ★
- ☐ Information about your dependants
 - ☐ Birthday and net income
 - ☐ Post-secondary tuition available for transfer
- ☐ Capital gains information (if no T5008 slips)
- ☐ Child support or alimony information
- ☐ Home buyers' plan and lifelong learning plan information ★
- ☐ Information about the sale of your principal residence
- ☐ Disability tax credit certificate
- ☐ Rental property income and expenses
- ☐ Self-employed people and commissioned employees
 - ☐ Income and expenses
 - ☐ Vehicle logbook
 - ☐ In-home office expenses
- ☐ Volunteer firefighter's or search and rescue volunteer certificate
- ☐ Northern residents information
- ☐ Business investment loss information (if you invested in a company that went bankrupt)
- ☐ Rent Assist information (MB) ★
- ☐ Graduate retention certification (SK)

Purchase for jobs/supplies receipts (ex. can tire, mcmunn)

Receipts for safety equipment, cleaning supplies

Sales invoices – bills to customers