

Personal Tax Organizer

Use this checklist to organize your personal tax papers. You can also send us your documents electronically.

- ☐ **Details on any changes to your family info** (marital status, dependents (did you have/adopt a child), changes in address, etc.)
- ☐ **Prior years' tax returns** (if prepared elsewhere) / **Notice of (re)Assessment from CRA**
- ☐ **T4** (employment income)
- ☐ **T4A** (pension, annuity and similar income, OAS, CPP, CRB*, CRSB*, CRCB*)
- ☐ **T4RIF** (receipts from RRIF)
- ☐ **T4RSP** (receipts from RRSP)
- ☐ **T4E** (E.I. benefits including maternity benefits)
- ☐ **T5** (interest and taxable dividends)
- ☐ **T5008** (dispositions of securities)
- ☐ **T101 and T102** (resource expenses flow-through shares)
- ☐ **T3** (statement of income from mutual funds, trusts, and income trust units)
- ☐ **T2200** (declaration of conditions of employment signed by the employer)
- ☐ **T2200S** (declaration of conditions of employment signed by employer)
- ☐ **T2222** Northern Resident Deduction
 - First year of claim (provide proof of residency)
 - Claim for travel benefit (provide travel documentation/applicable receipts)
- ☐ **T5013** (statement of partnership income/loss)
- ☐ **Investments (non-registered accounts)**. A list of all investments (i.e. stock, mutual funds) purchased and sold along with applicable details (i.e. sale price, cost and outlays) and management fees paid. If applicable, please request this information along with a capital gain/loss trading summary from your broker/banker.
- ☐ **Charitable donation receipts**
- ☐ **RRSP contribution receipts** (RRSP Home Buyers Plan details, and receipts from RRSP Life-time Learning Program withdrawals)
- ☐ **Details of foreign investments held personally** (request the foreign investment summaries broker/banker, if applicable)
- ☐ **Union or professional dues**
- ☐ **Interest expenses** (amount paid and details of loans for business or investment purposes)
- ☐ **T2202** (Student tuition receipts, endorsed by transferors, if applicable, and details of any student loan interest paid)
- ☐ **Medical receipts and receipts for the Home Accessibility Tax Credit**
- ☐ **Political contribution receipts**
- ☐ **Tax installment receipts/statement from CRA**
- ☐ **Child care expense receipts** (details)
- ☐ **Employment expense information** (meals, home office, etc.)
- ☐ **Working from Home employment expense information** (supplies, home office, etc. or # of days worked at home)
- ☐ **Self-employment information** (revenue/expenses or farming information and related GST information)
- ☐ **Summary of rental properties, receipts and expenses – by property**
- ☐ **Moving expenses and details/ Labour Mobility Deduction for Tradespeople**
- ☐ **Details of alimony or maintenance received or paid**
- ☐ **Details of all real estate acquisitions and dispositions during the year, including your principal residence**
- ☐ **Receipts for the Early Childhood Educator School Supply Tax Credit** (teachers only)
- ☐ **Receipts for the Digital News Subscription Credit**
- ☐ **Receipts for Children's Arts** (Yukon residents only)
- ☐ **Details of any dependents for which you are claiming personal tax credits** (caregiver, disability, eligible dependent) **or if you are eligible for the disability tax credit yourself, please advise us.**

*COVID-19 Programs: Canada Recovery Benefit (CRB); Canada Recovery Sickness Benefit (CRSB); Canada Recovery Caregiving Benefit (CRCB)