

General Income Tax Checklist

Dear Client:

Here's a recommended checklist of general documents for income tax preparation in Ontario. Gathering these documents in advance will help ensure accurate filing and maximize potential deductions and credits.

Income Documents

1. **T4 Slip** – Employment income
2. **T4A Slip** – Pension, retirement, annuity, and other income
3. **T4E Slip** – Employment Insurance and other benefits
4. **T5 Slip** – Investment income (interest, dividends)
5. **T3 Slip** – Income from trusts or mutual funds
6. **T4RSP Slip** – RRSP income
7. **T4A(P) and T4A(OAS) Slips** – CPP and OAS payments
8. **T5007 Slip** – Social assistance or Workers' Compensation benefits
9. **Rental Income Records** – Receipts for rental income and expenses if you rent out property
10. **Self-Employment Income** – Records of income and expenses (invoices, receipts)
11. **Foreign Income Records** – Income earned outside Canada, if applicable

Deductions and Credits

1. **RRSP Contribution Receipts** – For contributions made during the tax year and the first 60 days of the new year
2. **Child Care Expenses** – Receipts for eligible child care expenses
3. **Tuition and Education Receipts (T2202)** – For tuition fees and eligible education amounts

4. **Medical Expenses** – Receipts for medical expenses that qualify
5. **Charitable Donation Receipts** – For eligible donations made during the year
6. **Transit Passes or Other Public Transit Receipts** – If eligible for the Public Transit Tax Credit
7. **Disability Tax Credit Certificate (T2201)** – If you or a dependent qualifies for the credit
8. **Moving Expenses** – Receipts for moving expenses if you moved for work or school and meet CRA requirements
9. **Home Office Expenses** – If you worked from home, expenses for utilities, internet, rent, etc.
10. **Union or Professional Dues Receipts** – For dues paid to a recognized union or professional association

Additional Supporting Documents

1. **Notice of Assessment (NOA) from the Previous Year** – To review any carryforward balances (e.g., RRSP contribution room, capital losses)
2. **Property Tax or Rent Receipts** – If claiming the Ontario Trillium Benefit or other property-related credits
3. **Investment Statements** – Details of capital gains and losses, interest, and dividends for investments
4. **Mortgage Interest Statement** – If claiming investment property deductions
5. **Bank Statements** – Showing relevant income or expenses, especially for self-employed individuals
6. **Receipts for Energy-Efficient Home Renovations** – If you qualify for related tax credits