

# 2023 INCOME TAX CHECKLIST

## Tax Slips

- T4 slips (Employment Income)
- T4RSP, T4RIF slips
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Tuition / education receipts (T2202A)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- RRSP contribution slips (Don't forget slips for the first 60 days of 2024)
- COVID benefits/repayments (T4A)
- All other information slips




## Other documentation

- Notice of Assessment/Reassessment
- Canada Revenue Agency correspondence
- Sale or deemed sale of stocks, bonds or real estate
- Sale or deemed disposition of your personal residence (must be reported)
- Rental income and expense receipts
- Business, farm or fishing income/expenses
- Automobile / Travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)

## Receipts

- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons & apprentice mechanics)
- Medical expenses (summary from pharmacy if available)
- Charitable donations
- Political contributions
- Childcare expenses
- Adoption expenses
- Moving expenses
- Rent and property tax receipts
- Renovation expenses for HATC or multigenerational home reno tax credit

**ACCOUNTING  
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