



Tax Checklist

To ensure you receive all eligible credits and deductions on your tax return, check off all items below applicable to you and your spouse. If you are unsure, check it off and we will follow up with you.

Income

- Employment Income (T4)
- EI, CERB, CRB, CRSB &/or CRCB (T4E, T4A)
- Old Age Security & CPP (T4A-OAS, T4AP)
- Grants, Scholarships, Bursaries, Awards (T4A)
- Other Pensions &/or Annuities (T4A)
- RRSP, RIF Withdrawals (T4RSP, T4RIF)
- Interest, Dividends &/or Mutual funds (T3, T5)
- Other Investments (T5008, T5013)
- Social Assistance, PWD or WCB (T5007)
- Spousal Support Received
- Foreign Income
- Rental Property Income (Checklist)
- Self Employment Income (Checklist)
- Delivery Driver Income (Checklist)
- Other not listed _____

Other Information

- Address Change in Tax Year
- Sale of Principal Residence
- Marital Status Change in Tax Year
- Direct Deposit set up or update with CRA
- Instalments
- Other not listed _____

Deductions, Credits & Expenses

- RRSP or FHSA Contributions
- Tuition & Exam Fees (T2202)
- Interest Paid on Student Loans
- Professional Fees or Union Dues
- Charitable & Political Donations
- Medical Expenses
- Child Care Expenses
- Spousal &/or Child Support Paid
- Employment Expenses (T2200 & Checklist)
- Trade Tool Deduction (T2200 & signed tool list)
- Trade Training Tax Credit
- Meals & Lodging Transport Employees (TL2)
- Eligible Educator School Supply Tax Credit
- Moving Expenses
- Home Buyer Tax Credit
- Disability Tax Credit &/or Infirm Caregiver Credit
- Home Accessibility Tax Credit
- Investment Fees & Loan Interest
- Digital News Subscription Expense
- Volunteer Firefighter or Search & Rescue
- BC Renters Tax Credit 2023 & 2024 (Checklist)
- Other not listed _____

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