

Tax Information Checklist

Principal Residence Reporting

All taxpayers who sell their home must report the sale on their tax return, even if it was their principal residence for the whole time they owned it.

Foreign Property Reporting

Canadian resident individuals who held property outside Canada with a total cost of more than \$100,000 CAD at any time in the tax year must comply with special reporting to CRA.

Important Dates to Remember

March 1	Final date for RRSP contributions
March 15	Payment due date for first quarterly tax instalment
April 30	Due date for income tax return due and payment of taxes owing
June 15	Filing due date for income tax return due for self-employed individuals

Slips

- T4 slips for employment income
- T4E for employment insurance payments
- Employment Insurance benefits (T4A)
- COVID-19 relief payments (T4A)
- Interest, dividends, mutual funds (T3, T5, T5008)
- T2202 Tuition Fees
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social Assistance payments (T5007)
- Worker's compensation benefits (T5007)
- Alimony and/or maintenance received
- All other information slips

Receipts (continued)

- Adoption expenses
- Moving expenses
- Investment expenses (interest, mgmt. fees)
- Home-office expenses
- Exams for professional certification
- Digital news subscription

Receipts

- RRSP contribution and withdrawal
- Union or professional dues
- Charitable donations / political contributions
- Alimony and/or support for a child, spouse, or common-law partner
- Tool expenses (Tradespersons & apprentice mechanics)
- T2200 Employment expenses
- Teacher's school supplies
- Medical expenses, including plan premiums
- Child care receipts
- Student loan interest
- Home renovations (seniors and disabled)

Other documentation / income sources

- Notice(s) of (re) assessment
- Sale of principal residence
- Sale of deemed sale of stocks, bonds, or real state
- Northern residents' deduction receipts
- Rental property revenue and expenses
- Business, self-employed income and expenses
- Automobile/travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment
- Volunteer Firefighters certification
- Search and Rescue volunteer's certification