



# CHECKLIST

## ***THE DOCUMENTS NECESSARY TO PREPARE YOUR TAX DECLARATION FOR MAXIMAL RETURNS***

### **SHEETS**

- Employment income - T4 / Relevé 1 (for each job)
- Self-employment income - T4A / Relevé 1
- RRSP withdrawal - T4RSP / Relevé 2
- Old Age Security Benefits - T4A (OAS)
- RRQ retirement benefits - T4A (P) / Relevé 2
- Other pensions and annuities - T4AP / Relevé 2
- RRIF withdrawals - T4RIF / Relevé 2
- Employment Insurance Benefit - T4E (Q)
- Social assistance or industrial accident benefits - T5007 / Relevé 5
- Investment income - T5008 / Relevé 18 or T4PS / Relevé 25
- Trust Income - T3 / Relevé 16
- Dividend income - T5 / Relevé 3
- Partnership income - T5013 / Relevé 15
- Tuition Fee Certificate - T2202 / Relevé 8 (CEGEP and University)
- (Tenants only) Relevé 31 (ask your landlord)

### **RECEIPTS**

- RRSP contributions
- Medical expenses (go to your pharmacy for a summary of the year)
- Contributions to a professional order
- Receipt for donations (more than 20\$)
- Political contributions (federal political party only)
- Child care expenses (Relevé 24)
- Fees paid for children's artistic and sporting activities (6 years and over)
- Interest paid on a student loan
- Financial costs paid in fees
- Lawyer fees (to establish / reduce alimony)
- Home support credit (Relevé 19) - receipts with eligible expenses
- Declaration of working conditions - T2200 / TP-64.3

### **OTHER DOCUMENTS**

- The latest notices of assessment from the CRA and Revenu Québec
- Correspondence from the CRA and Revenu Québec
- Sample check - direct deposit registration (optional)

If you are self-employed, you are provided with an additional form to complete with your income and expenses. We also do the same with your rental income.