

Tax Return Document List

(as per individual profile)

(Silver) “T” Forms (e.g., T3, T4, T4A, T4E, T5, T5008, T2202)

Send all “T” forms you have:

- T2201 (Disability Tax Credit Certificate)
- T2202 (Tuition and Enrolment Certificate) – College / University
- T3 (Statement of Trust Income Allocations and Designations)
- T4 (Statement of Remuneration Paid) – Employees
- T4A (Statement of Pension, Retirement, Annuity, and Other Income) – Other Income
- T4E (Statement of Employment Insurance and Other Benefits)
- T4FHSA (First Home Savings Account Statement)
- T4PS (Statement of Employee Profit-Sharing Plan Allocations and Payments)
- T5 (Statement of Investment Income) – Investments and Dividends
- T5007 (Statement of Benefits)
- T5008 (Statement of Securities Transactions)
- T5018 (Statement of Contract Payments) – Payments for Construction Work
- RC210 (Working income tax benefit advance payments statement)

Note: TFSA does not need to be reported. Therefore, there is no need to send any document.

(Silver) Contributions to Professional Union Dues

- Payment receipt issued by the professional association

(Silver) Application for BC-Renters; ON-OTB; MB-Renters or HATC

- Inform the amount of rent paid during the year for each address
- Complete previous address if you moved during the year
- Number of months lived at each address
- Name of the landlord or real estate agency
- For Ontario: amount paid for energy and name of the energy company

(Gold) Contributions to RRSP or FHSA

- RRSP (Registered Retirement Savings Plan) – Issued by the financial institution
- FHSA (First Home Savings Account) – Issued by the financial institution

(Gold) Donations to charities registered with the CRA

- Payment receipt issued by the entities with proper CRA registration (churches, food banks, health institutions)

Note: GoFundMe does not count.

(Gold) Childcare expenses

- Receipt issued by the child care provider, including before and after school programs
- Receipt issued by the entity that runs CAMP during school holidays. Sports classes not linked to CAMP or Child Care do not count.

(Gold) Medical and dental expenses

- Receipts from duly accredited doctors and dentists
- Health plan statement with co-payment amounts
- Receipts for purchase of prescription medications, including cannabis

(Gold) Purchase of first property in Canada

- Purchase/sale contract of the property

(Gold) Foreign assets valued between CAD 100,000 and 250,000

- The sum of all income-generating assets (rental property, financial investments, bank balances, stocks, cash, jewelry, etc.). Usually, additional information is requested for this item.

(Sapphire) Employment expenses – T2200

- T2200 form signed by the employer
- Receipts for expenses to be reported

(Emerald) Foreign income that is not complex (e.g., salary, interest, etc.)

- Foreign income statement
- Proof of payment of income tax paid abroad

(Emerald) Rental income – T776

- Property details
- Amounts received
- Receipts for expenses paid by the owner (property tax, renovations, administrative fees, etc.)
- Proof of payment of income tax paid abroad, if applicable

(Emerald) Moving expenses due to work – T1-M

- Receipts for expenses (hotel, meals, fuel, airline tickets, moving company)
- Usually, additional information is requested for this item.

(Emerald) Sale of residential property in Canada

- Purchase/sale contract of the property
- Definition if the property is the principal residence

(Ruby) Self-employed or ride-sharing/delivery (Uber, DD, STD)

- Statement of income issued by the platforms
- Fuel receipt
- Car insurance payment
- Car repair and maintenance receipts
- Invoice for car purchase
- Financing or leasing contract
- Data on mileage driven during the year
- Receipts for all business-related expenses as self-employed
- Invoices issued as self-employed
- Usually, additional information is requested for this item.

(Diamond) Complex foreign income (stock market)

- Statement with the list of all securities traded on the stock exchange
- Stock exchange statement or trading notes
- Proof of tax payment, when due
- Statement or income report from brokerage firms

(Diamond) Foreign assets valued above CAD 250,000

- Detailed list of each asset located outside Canada
- Income tax return submitted in another country

(Diamond) Capital gain/loss in foreign currency

- Statement of operations with capital gain or loss
- Proof of tax payment, when due

NOTE: THIS IS A LIST TO HELP UNDERSTAND MOST OF THE DOCUMENTS NEEDED FOR TAX RETURN PREPARATION. HOWEVER, OTHER DOCUMENTS AND/OR INFORMATION MAY BE REQUIRED BASED ON THE CLIENT'S PROFILE.