



After Hours Financial  
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## Canada Tax Checklist

<b>Personal Information</b>	
Social Insurance Number (SIN) *	Tuition transfer amount from spouse or child *
Date of Birth *	Last year's return *
Information about spouse/common-law partner	Notice of Assessment from last year's return *
Information about dependents – Any changes	Amount of instalment payments made to CRA
Spouse and/or child net income amounts	Other CRA correspondence
<b>* If your return was not prepared by After Hours Financial in the previous year, we will require this information.</b>	

<b>Income</b>	<b>Receipts</b>
Employment income – T4s	RRSP Contributions (Including first 60 days of current yr.)
Self-employed business income (T2125, T5013, T4A)	Employment expenses (T2200 signed by employer)
Interest, dividends, mutual funds (T3, T5, T5008)	Work-from-home expenses due to COVID-19 (T2200S)
Rental income and expenses (T776)	Tool expenses
Old Age Security and CPP benefits (T4A-OAS, T4A-P)	Union dues not included on your T4
Pension and annuity income (T4A)	Exams for professional certification
RRSP and RIF income (T4RSP, T4RIF)	Teacher's school supplies
Employment Insurance benefits (T4E)	Childcare expenses
COVID-19 benefits received (T4A)	Adoption expenses
Social Assistance payments (T5007)	Disability tax credit for self or dependents
Workers' Compensation benefits (T5007)	Medical expenses
Other income not reported on a slip (e.g. tips)	Personal attendant/facility care expenses
	Charitable donations
<b>Other Information</b>	Northern residents' deduction
Sale of Principal residence	Digital News subscription expenses
Sale or deemed sale of stocks, bonds or real estate	Political contributions
RRSP deduction limit and unused amounts	Moving expenses
TFSA contribution room	Home accessibility expenses
Tuition carry forward amounts	Home Buyers' Amount
Loss carry forward amounts	Tuition expenses
Other carry forward amounts (donations, etc.)	Student loan interest amounts
	Tax-exempt scholarships
	Support payments made or received