

Checklist - Personal tax

This form is to make sure you submit all the documents requested to produce your tax declaration. Please complete the **Drop-off Services form** on our online portal to create your file. Columns in **blue** apply only for the province of Quebec. By clicking on the hypertext links below, you will obtain more details on the documents, credits or forms selected.

| SLIPS | | | |
|---|--|--|--------|
| Federal | Quebec | Federal | Quebec |
| T4 (remuneration paid) | RL-1 & RL-22 | T5003 (Tax Shelter information) | RL-14 |
| T4E (Employment-insurance) | RL-1 & RL-2 | T5006 (Class A shares) | RL-10 |
| T4RIF (Income from a Registered Retirement Income Fund) | RL-2 | T5007 (Benefits) | RL-5 |
| T4RSP (RRSP income) | RL-2 | T5008 (Security Transactions) | RL-18 |
| T4PS (Employee Profit-Sharing Plan Allocations and payment) | RL-25 | T5013 (Partnership income) | RL-15 |
| T4A (Pension, Retirement, Annuity and Other income) | RL-6 | T5018 (Contract payments) | RL-27 |
| T4A (OAS) et T4A (P) Canada Pension Plan Benefits and Old Age Security) | None | T2202A (Tuition Enrolment Certificate) | RL-8 |
| T5 (Investments Income) | RL-3 | RC210 (Working Income Tax Benefit Advance Payment) | None |
| T3 (Trust Income Allocations) | RL-16 | | |
| SLIPS (QUEBEC ONLY) | | | |
| RL-19 (Advance payment of tax credits) | | RL-21 (Farm support payments) | |
| RL-22 (Multi-employer insurance plans) | | RL-23 (Recognition of volunteer respite services) | |
| RL-24 (Childcare Expenses) | | RL-30 (Subsidized educational childcare) | |
| RL-31 (Information about a leased dwelling) | | | |
| OTHER DOCUMENTS TO PROVIDE | | | |
| RRSP (Mar to Dec AND Jan to Feb) | Amount of your <u>HBP / LLP</u> | <u>Financial documents capital gains / losses</u> | |
| <u>Volunteer Firefighter / Search and Rescue</u> | <u>Medical Receipts/Pharmacy Statement</u> | <u>Student Loan Interest</u> | |
| <u>T2201</u> (Disabled persons certificate) | <u>Donation receipts</u> | <u>Childcare receipts</u> | |
| <u>Support payments</u> | <u>Adoption expenses</u> | <u>Tuition fees</u> | |
| <u>Interest charges, financial expenses or fees for managing your investments or generating income</u> | Children’s physical and artistic activity program (16 years old and under in Quebec/Manitoba/Yukon) | Notice of assessment / reassessment from last year* | |
| <u>Instalments paid during the year (If applicable)</u> | <u>Receipt political contribution</u> | <u>Document for Caregivers</u> | |
| <u>Receipt for school supplies teachers / educators</u> | <u>Union or professional membership dues</u> | <u>Tools</u> (tradespersons) | |
| Simplified Employment expenses (COVID-19)OR detailed (T2200) | <u>Rental income</u> | <u>Declaration of the sale of a residence</u> | |
| <u>Moving expenses</u> (40 km and + for work or post secondary school) | <u>Self-employed worker</u> (income and expenses information on GST / QST) | <u>Northern residents - Travel expenses</u> | |
| <u>Municipal tax account</u> | <u>Home support for seniors</u> | <u>Receipt for seniors' activities</u> | |

*Only if you are a new customer.