



Document Checklist for Tax Filing

To help us serve you better and ensure you receive all eligible tax deductions and credits, please provide the following documents as applicable to your situation.

Slips

- Employment Income (T4/RL1)
- Employment Insurance Income (T4E)
- Interest, Dividends, Mutual Funds (T3/RL16, T5/RL3, T5008/RL18)
- Old Age Security or Canada Pension Plan (T4A(OAS), T4A(P)/RL2)
- Tuition Fees (T2202A/RL8)
- Private Retirement Income (T4A/RL2)
- CSST or Social Assistance Income (T5007/RL5)
- Scholarship Income (T4A)
- Québec renters: Relevé 31 (ask your landlord)
- CERB and/or CRB (T4A, RL1)
- All other relevant slips

Receipts

- RRSP Contributions (RL10)
- Medical Expenses
- Charitable Donations
- Political Contributions
- Union or Professional Dues
- Child Care Expenses (RL24)
- Adoption Fees
- Moving Expenses (For Employment or Studies)
- Home Office Costs (Telework-related T2200, TP64.3)
- Others

Others Documents

- Specimen check for direct deposit enrollment CRA (if it's your first tax return in Canada)
- Last year's notice of assessment (not mandatory but necessary)
- Municipal tax bill (mandatory to receive the social solidarity credit)
- Sale or presumed sale of real estate, shares, or bonds
- Shared custody documents
- Tax credit for disabled persons (T2201)
- Rental expenses and income register (see our form online)
- Business expense and income register (see our form online)
- Home office costs (self-employed)

- Automobile/travel and expense register (self-employed)
- Declaration of working conditions (T2200 & TP64.3)
- Volunteer firefighter certificate
- Certificate for research and rescue volunteer
- Remote resident deduction
- COVID amounts received from the IPREW paid by the Quebec Government (RL1)
- COVID home office charge (Teleworker T2200, T2200S, TP64.3, TP59.S)
- Others: _____

Thank you for choosing Proficiency Tax Services! If you have any questions or need assistance, please feel free to contact us using the details below. We're here to help make your tax season stress-free!

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