

Checklist: Get ready for tax time

Take the stress out of tax time by preparing what you need in advance.

Personal information

CRA MyAccount login information

Current mailing address
(update it if you've moved)

Direct deposit banking information
(if CRA does not have it on file)

Social Insurance Number
(SIN)

Current address and contact information

Previous tax year's information

Notice of Assessment from previous year

Notice of Re-Assessment
(if applicable)

Tax return from previous year

Income slips (check which ones apply to you)

T3

T4
Employment Income

T4A
OAS

T4AP
CPP

T4A
Other Pensions

T4E
Employment Insurance (EI)

T5007
Social Assistance / Worker's compensation

T5008

Other:

Other:

Other:

Note: You may have other income slips not listed here.
For a comprehensive list of income tax slips visit Canada.ca:
[Tax slips](#).

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Receipts to claim deductions or credits (check which ones apply to you)

- Charitable donations
- Political contributions
- RRSP contributions
- Rent receipts / Record of rent paid
- Union dues
- Home renovation expenses
(seniors or people with a disability)
- Employment expenses
- Medical expenses
- Disability Tax Credit (DTC)
- Other:
- Other:
- Other:

After tax-filing: Set yourself up for next year

- Collect all papers and slips in a safe and accessible place
(electronic folder, file box, envelope in a drawer, etc)
- Save new Notice of Assessment with other tax papers
- Set calendar reminder for next year to gather all slips and receipts

Notes

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Note: You may have other deductions not listed here. For a comprehensive list of all deductions, credits, and expenses, visit Canada.ca: [Claiming deductions credits, and expenses](#).

