



Outsourced Bookkeeping, Tax Services
and Business Consulting

KHFINANCIAL.CA | 416.897.4771 |

INFO@KHFINANCIAL.CA

Working with Canadians,
helping them reach their goals

Check List of Documents you May Need:

Not everything may apply to you, this list is for reference only. Please ask us if you have questions

Income Slips

- All T4 slips
- All other information slips (T3, T5, T4E, T4A, T4AP, T4RSP, T4RIF)
- Employment Insurance benefits (EI) T4E
- Old Age Security and CPP benefits
- Other pensions and annuities
- Workers' compensation benefits
- Social assistance payments

Deductions/Receipts

- Interest and commissions on investments
- Sale or deemed sale of stocks, bonds or real estate
- Support for a child, spouse or common-law partner
- RRSP contributions
- Professional fees or Union dues
- Tool expenses (tradespersons)
- Medical expenses
- Tuition/Education amounts for qualifying students (T2202a)
- Transit passes
- Charitable donations
- Political contributions
- Child care expenses
- Adoption expenses
- Children's Fitness and Arts programs
- Moving expenses (If you moved greater than 40km)
- Interest paid on student loans
- Carrying charges and interest expenses
- Automobile expenses (If you have a T2200 from your employer)
- Travel expenses (If you have a T2200 from your employer)
- Office-in-home expenses (If you have a T2200 from your employer)

Other Documentation

- Universal Child Care Benefit RC62

- Notice of Assessment
- Canada Revenue Agency correspondence
- Capital gains/losses records
- Northern residents deductions
- Rental income & expense records (T776)
- Business, farm or fishing income & expense records (T2125)
- Disability Tax Credit Certificate (T2201)
- Declaration of Conditions of Employment (T2200)
- Automobile/Travel Logbooks