

# Tax Filing Checklist

It's tax season, and no matter how many times you've gone through the ritual of preparing your income tax return, our refresher will help get you organized and on track for what will hopefully be a smooth and painless experience.

## Reference materials

It may help to have last year's return handy as a guide to figuring out which slips and forms you may require for this year's return, and which lines must be completed on those forms. Of course, circumstances can change but knowing what you needed last time is a good starting point for gathering info.



Similarly, last year's CRA Notice of Assessment could help. Each notice contains valuable info, such as your RRSP deduction limit for the next tax year, the amount of unused net capital losses that can be applied to reduce future taxable capital gains, and the correction of mistakes you might have made on your return. Finally, note any tax installments you paid over the year as well as any relevant correspondence you received from the CRA.

Here's a checklist to help gather your tax slips, forms and other required info that'll be used when completing your income tax return.

## Federal tax slips

- **T3:** Investment income (allocations, distributions) received during the tax year
- **T4:** Employment income (also includes CPP/EI premiums paid, income tax deducted, pension adjustment amount, charitable donations made through payroll, etc.)
- **T4A:** Pension, retirement, annuity and other income received
- **T4A(OAS):** Old Age Security pension benefits
- **T4A(P):** Canada Pension Plan benefits
- **T4E:** Employment Insurance benefits
- **T4RIF:** Income received from a RRIF
- **T4RSP:** Income received from an RRSP
- **T5:** Investment income (e.g., interest earned from bank accounts and GICs; corporate-class mutual fund distributions)
- **T2202:** Tuition and related fees (or a TL11 form if you studied outside of Canada)
- **T5013:** Statement of Partnership Income

## Receipts/documentation

- RRSP receipts for contributions made in previous calendar year, up to first 60 days of current year
- Investment-related expenses, including loans used for investing purposes
- Child care and/or adoption expenses
- Child support, alimony/spousal support payments
- Medical expenses
- Moving expenses
- Charitable donations, political contributions
- Professional or union dues not on your T4 slip
- Digital news subscription fees
- Business income and related expenses
- Rental income and related expenses
- Investment counsel fees and carrying charges
- Documents pertaining to the sale of real estate

## Work-from-home expenses

Regarding the deduction for home office expenses that was introduced during COVID-19, some rules and conditions have changed. According to the [CRA](#), eligible employees working from home in 2023 must use the detailed method to claim home office expenses. The temporary flat rate method no longer applies. Visit the [Government of Canada website](#) to learn more about eligible expenses and other important information concerning work-from-home expenses.

Our checklist is a basic compilation of common slips, receipts and other documents you may need while completing your income tax return, but it isn't exhaustive. Not all items will apply to you, and you might need additional info to file your return. We recommend consulting a qualified professional to help ensure you complete your return accurately and fully, claiming all deductions and credits for which you're eligible.

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