

Personal Income Tax Return Checklist

To file your personal income tax return through QualiVests, in order to maximize your tax refund and benefits, please prepare all information and documents according to this checklist. For more information visit our website.

www.QualiVests.ca



Personal Information

- *✓ First & Last name (For family tax, all family members information)
- *✓ Social Insurance Number (For family tax, all family members information above 18 years old)
- *✓ Mailing Address
- *✓ Telephone number
- *✓ Email Address
- *✓ Date of Birth (For family tax, all family members information)
- *✓ Marriage Status
- *✓ Citizenship
- *✓ Bank account information if you want to set up or update your direct deposit with the CRA

Notes: For all existing clients, we have your information on file. Just let us know of anything you want to update.



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Ottawa, ON, K4P 0B3



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Tax Slips (available on the CRA My Account)

- *✔ T4 (Employment income)
- *✔ T3, T5, T5008 (Interest, dividends, mutual funds)
- *✔ T4E (Employment insurance benefits)
- *✔ T4A(P), T4A(OAS), T4A (Old Age Security and CPP benefits)
- *✔ T4A (Other pensions and annuities)
- *✔ T4RIF (Statement of income from Registered Retirement Income Fund)
- *✔ T4RSP (How much money you withdrew from or received out of your RRSPs and how much tax was deducted Also shows money withdrawn from an RRSP under Ho Buyer's Plan and amounts transferred an RRSP to a spouse or partner under a court judgment or written agreement)
- *✔ T5007 (Social assistance payments/ Workers' compensation benefits)
- *✔ RRSP contribution slip
- *✔ T2202A (Tuition / education receipts)

Notes: You can authorize us to get the above slips from the CRA online service My Account. However, there may be missing or incorrect slips. Therefore, we are still encouraging you to have all your tax slips while preparing your tax return.



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Tax Slips and information (not available on the CRA My Account)

- *✔ Child care expense
- *✔ Support for a child, spouse or common-law partner
- *✔ Professional or union dues
- *✔ Tool expenses (Tradesperson & apprentice)
- *✔ Interest expenses or management fees to earn income from an investment.
- *✔ Rent or property tax payment amount
 - ✔ Address
 - ✔ Postal code
 - ✔ Number of months you were in this address in the tax year
 - ✔ Total Amount you paid
 - ✔ Name of Landlord/Municipality that received rent/property tax
- *✔ Medical expenses (each medical expense needs separate information)
 - ✔ Payment Date
 - ✔ Name of patient
 - ✔ Payment made to
 - ✔ Description of Expense
 - ✔ Amount you paid
- *✔ Charitable donations
- *✔ Political contribution
- *✔ Adoption expense
- *✔ Interest paid to your student loan



- ✔ Carrying charges and interest expense
- ✔ Office-in-home expenses
- ✔ Exams for professional certification
- ✔ Others

Newcomers who file their tax return for the very first time

- ✔ Date of entry to Canada
- ✔ Canadian source income before coming to Canada
- ✔ Foreign source income before coming to Canada

Other Information

- ✔ Notice of Assessment/Reassessment
- ✔ Canada Revenue Agency correspondence
- ✔ The sale or deemed sale of stocks, bonds or real estate
- ✔ Northern residents' deductions receipts
- ✔ Rental income and expense receipts
- ✔ Business, farm or fishing income/expenses
- ✔ Automobile / Travel logbook and expenses
- ✔ Disability Tax Credit Certificate



- ✔ Declaration of Conditions of Employment (T2200) or Declaration of Conditions of Employment for Working at Home Due to COVID-19 (T2200S)
- ✔ Volunteer Firefighters certification
- ✔ Search and Rescue volunteer's certification
- ✔ Custody Arrangement documentation



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