



Fortress Accounting & Tax Services
209 -1021 Court Ave, Winnipeg, MB
431-777-8297 | 204-333-5767
info@canadataxreturn.ca
<http://www.canadataxreturn.ca>

Income Tax Checklist

1. Personal Information:

- ✓ Full legal name
- ✓ New Social Insurance Number (SIN), (if applicable)
- ✓ Change in Marital status and spouse's information. (if applicable)

2. Income Documents:

- ✓ T4 slip (employment income)
- ✓ T4A slip (pension or other income)
- ✓ T5 slip (investment income)
- ✓ T3 slip (income from trusts)
- ✓ T5007 slip (social assistance payments)
- ✓ Any other relevant income documentation

3. Deductions and Credits:

- ✓ Receipts for eligible medical expenses
- ✓ Receipts for charitable donations
- ✓ Education-related receipts (T2202A for tuition, textbooks, etc.)
- ✓ RRSP contribution receipts.
- ✓ Moving expenses receipts– if moving into/out of province for work or school.
- ✓ Statements of rent paid.
- ✓ Only one person per household may claim Rent.
- ✓ Medical receipts,
- ✓ Dental receipts
- ✓ Prescription receipt.



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- ✓ Childcare expenses
 - ✓ Daycare receipts
 - ✓ Fitness fees receipts
 - ✓ Arts & cultural Fees receipts
 - ✓ Lunch programs receipts.
- 4. Employment Expenses:** (if applicable)
 - ✓ T2200 Declaration of Conditions of Employment form, completed by your employer,
 - ✓ Receipts for work-related expenses (e.g., vehicle expenses, supplies, etc.)
- 5. Business and Self-Employment:** (if applicable)
 - ✓ Income and expense records.
 - ✓ Receipts for business-related expenses.
 - ✓ Statement of Business Activities.
- 6. Rental Income:** (if applicable)
 - ✓ Rental income and expense records
 - ✓ Rental property details
- 7. Capital Gains and Losses:**
 - ✓ Records of the purchase and sale of investments or properties
 - ✓ Receipts for improvements made to properties.
- 8. Bank Information:**
 - ✓ Bank account details for direct deposit (*Optional otherwise you will be receiving a check in mail*)