

CANADIAN TAX ORGANIZATION PACKAGE

PAGE 1 | MASTER TAX DOCUMENT CHECKLIST

Name: _____

Tax Year: _____

For general informational and organizational purposes only; not tax, accounting, legal, or financial advice. Tax rules can change. Confirm current requirements with the Canada Revenue Agency or a qualified tax professional.

Before You Start

- ☐ Social Insurance Number (SIN) for each person filing
- ☐ CRA My Account access information
- ☐ Last year's income tax return
- ☐ Latest Notice of Assessment or Notice of Reassessment
- ☐ Current address and direct-deposit information
- ☐ Tax software or tax preparer information, if applicable

Income & Government Slips

- ☐ T4 - employment income
- ☐ T4A - pension, retirement, annuity or other income
- ☐ T4A(OAS) - Old Age Security
- ☐ T4A(P) - Canada Pension Plan / Quebec Pension Plan benefits
- ☐ T4E - Employment Insurance benefits
- ☐ T5007 - social assistance or workers' compensation benefits, if applicable
- ☐ T3 - trust income
- ☐ T5 - investment income
- ☐ T5013 - partnership income, if applicable
- ☐ Other income records not reported on a slip

Investments, Savings & Retirement

- ☐ RRSP contribution receipts
- ☐ T4RSP / T4RIF slips, if applicable
- ☐ T4FHSA - First Home Savings Account Statement, if applicable
- ☐ T5008 securities transaction slips, if applicable
- ☐ Investment statements
- ☐ Adjusted cost base / purchase and sale records where needed
- ☐ Foreign income or foreign-property records, if applicable

Medical, Donations & Family

- ☐ Medical receipts and proof of payment
- ☐ Private health-plan premium records, where applicable
- ☐ Official charitable donation receipts
- ☐ Childcare receipts and provider information
- ☐ Tuition slip (T2202), if applicable
- ☐ Student loan interest records, if applicable
- ☐ Support-payment or dependant-related records, if applicable

Employment Expenses

- ☐ Form T2200, where required
- ☐ Form T777 records used to calculate eligible employment expenses
- ☐ Receipts and invoices for eligible employment expenses
- ☐ Travel records, if applicable
- ☐ Monthly credit-card statements supporting claims
- ☐ Vehicle logbook and mileage records, if applicable

CANADIAN TAX ORGANIZATION PACKAGE

PAGE 2 | BUSINESS, RENTAL & PROPERTY RECORDS

Self-Employment / Small Business

- ☐ Sales invoices and income records
- ☐ Business bank statements
- ☐ Business credit-card statements
- ☐ Expense receipts organized by category
- ☐ Vehicle logbook and mileage records, if applicable
- ☐ Home-office records, if applicable
- ☐ Equipment / capital asset purchase records
- ☐ GST/HST records, if registered
- ☐ Advertising, software, professional fees and supply receipts

Rental Property

- ☐ Rental income records
- ☐ Mortgage-interest statements, where applicable
- ☐ Property tax records
- ☐ Insurance records
- ☐ Repair and maintenance receipts
- ☐ Capital-improvement records
- ☐ Utilities paid by the landlord, where applicable
- ☐ Property-management / professional-fee receipts
- ☐ Personal-use allocation records if only part of the property is rented

Moving, Home & Property

- ☐ Eligible moving-expense receipts, if applicable
- ☐ Principal residence sale information, where applicable
- ☐ Property purchase and sale records
- ☐ Records connected to long-term property cost history
- ☐ Any other supporting documents related to your tax return

Rental-property reminder

Mortgage principal is not deductible as a rental expense. Mortgage interest may be relevant when CRA rules are met. Keep repairs separate from capital improvements because they can receive different tax treatment.

Year-Round Organization

- ☐ Create one folder for each tax year
- ☐ File slips and receipts as they arrive
- ☐ Use clear digital file names
- ☐ Back up important tax records
- ☐ Review the folder monthly so missing items are easier to spot

Digital Record Security

- ☐ Use strong passwords for tax-related accounts
- ☐ Keep digital copies complete and readable
- ☐ Avoid unsecured shared folders
- ☐ Keep a backup of important records

CANADIAN TAX ORGANIZATION PACKAGE

Use this page to track missing slips, receipts or records so you know what still needs to be found before you file.

Document / Slip	Expected From	Requested	Received	Filed / Saved

If a tax slip is missing

Contact the employer, financial institution, pension administrator or other issuer first. If the issuer has sent the slip to CRA, it may appear in CRA My Account. OAS, CPP and EI slips may also be available through My Service Canada Account.

Examples to track: T4, T5, RRSP receipt, childcare receipt, donation receipt, medical receipt summary, rental statements, business statements and Notice of Assessment.

CANADIAN TAX ORGANIZATION PACKAGE

PAGE 4 | AFTER YOU FILE

Date filed:

Method used:

Refund / Balance owing:

Notice of Assessment received:

Notice of Reassessment received (if any):

Documents stored under folder:

Keep records until at least:

After-Filing Checklist

- ☐ Save a copy of the filed return
- ☐ Save the Notice of Assessment
- ☐ Save any Notice of Reassessment
- ☐ Keep supporting documents organized by tax year
- ☐ Do not destroy records before the required retention period has passed

Notes

CRA record-keeping reminder: Keep your records for six years from the end of the last tax year they relate to, unless CRA gives you permission to destroy them earlier.

General information only - not tax, accounting, legal, or financial advice. Confirm current CRA requirements or consult a qualified tax professional.