



Canadian Income Tax Return Facts Sheet

Below is a list of all the necessary slips, receipts, and forms we may need to file your return. To ensure the timeliness maximization of your return, please make sure to send all applicable documentation. If you have any questions please feel free to call, email, or message us through our contact page. Thank you!

Common Slips

- Employment income (T4)
- Notice of assessment
- Interest, dividends, mutual funds (T3, T5, T5008)
- Tuition/education receipts (T2202)
- Other pensions and annuities, including scholarships and grants (T4A)

Other slips

- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Social assistance payments (T5007)
- Worker's compensation benefits (T5007)
- Employment insurance benefits (T4E)
- Universal Child Care Benefit (RC62)

Receipts

- RRSP contribution receipts
- Support for a child, spouse, or common-law partner
- Professional or union dues
- Medical expense
- Charitable donations
- Child care expenses
- Moving expenses
- Child arts and sports program expenses

Other documentation

Canada Revenue Agency Correspondence
Sale or deemed sales of stocks, bonds, or real estate
Rental income and expense receipts
Business expense receipts
Disability Tax Credit Certificate
Declaration of Conditions of Employment (T2200)

Information about tax deductible receipts (as per CRA guidelines):

RRSP contribution expenses

Deductible RRSP and PRPP contributions can be used to reduce your tax. Generally, any income you earn in the RRSP or PRPP is exempt from tax as long as the funds remain in the plan, however, you usually have to pay tax when you receive payments from these plans.

March 2, 2019 to March 2, 2020, is the period for contributing to your RRSP for amounts you want to deduct on your 2019 Income Tax and Benefit Return.

Child care expenses

You can claim child care expenses that were incurred for services provided in 2019. These include payments made to any of the following:

- caregivers providing child care services
- day nursery schools and daycare centres
- educational institutions, for the part of the fees that relate to child care services
- day camps and day sports schools where the primary goal of the camp is to care for children (an institution offering a sports study program is not a sports school)
- boarding schools, overnight sports schools, or camps where lodging is involved

Moving expenses

Generally, you can claim moving expenses you paid in the year if both of the following apply:

- you moved to work or to run a business, or you moved to study courses as a full-time student enrolled in a post-secondary program at a university, a college, or another educational institution
- you moved at least 40 kilometres closer to your new work or school

Medical expenses

You can claim only eligible medical expenses on your tax return if you, or your spouse or common-law partner:

- paid (out of pocket) for the medical expenses in any 12-month period ending in 2019
- did not claim them in 2018

Generally, you can claim all amounts paid, even if they were not paid in Canada.

Charitable Donations

You can claim a tax credit based on the eligible amount of your gift to a qualified donee. Qualified donees are:

- registered charities (list of charities)
- registered Canadian amateur athletic associations
- registered national arts service organizations
- registered housing corporations resident in Canada set up only to provide low-cost housing for the aged
- registered municipalities in Canada
- registered municipal or public bodies performing a function of government in Canada
- the United Nations and its agencies
- universities outside Canada, the student body of which ordinarily includes students from Canada, that have applied for registration and are registered with the CRA

Union or professional dues

Claim the total of the following amounts related to your employment that you paid (or that were paid for you and reported as income) in the year:

- annual dues for membership in a trade union or an association of public servants
- professional board dues required under provincial or territorial law
- professional or malpractice liability insurance premiums or professional
- membership dues required to keep a professional status recognized by law
- parity or advisory committee (or similar body) dues required under provincial or territorial law

*Annual membership dues do not include initiation fees, licences, special assessments, or charges for anything other than the organization's ordinary operating costs. You cannot claim charges for pension plans as membership dues, even if your receipts show them as dues.