



Your Financial Tool Kit

Developed by the Financial Consumer Agency of Canada, the Investor Education Fund and l'Autorité des marchés financiers



Pre-tax filing checklist

OK	Gather and sort your key tax documents into the following groups:
<input type="checkbox"/>	Social insurance number and other personal data
<input type="checkbox"/>	Income T-slips (T4s, T5s, etc.)
<input type="checkbox"/>	Records of any other income, such as an income statement from your self-employment
<input type="checkbox"/>	Receipts for tax deductions, including medical expenses, charitable donations, childcare or caregiver expenses, monthly transit pass, etc.
<input type="checkbox"/>	Data from past tax years such as your RRSP contribution limit, repayments required under the Home Buyers Plan or Lifelong Learning Plan
<input type="checkbox"/>	The tax package sent to you by the CRA, including your access code to file online or by telephone (If CRA did not send you a package for the current year, you can get a general income tax form online or from any post office.)