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:
☐	Social insurance number and other personal data
☐	Income T-slips (T4s, T5s, etc.) or RL-slips (RL-1, RL-2, RL-3, etc.)
☐	Records of any other income, such as an income statement from your self-employment.
☐	Receipts for tax deductions, including medical expenses, charitable donations, childcare or caregiver expenses, monthly transit passes, etc.
☐	Data from past tax years such as your RRSP contribution limit, repayments required under the Home Buyers Plan or Lifelong Learning Plan.
☐	The tax package sent to you by the CRA or the ARQ, including your access code to file online or by telephone (If CRA or the ARQ did not send you a package for the current year, you can get a general income tax form online or from any post office for the federal return or from most caisses Desjardins branches for the Quebec return.)