

2022 TAX INFORMATION CHECKLIST

Please indicate the slips/receipts/statements that you have included, as well as the number if there are multiples.

Example: if you have 5 donation receipts then you would indicate: 5 Charitable donations

NAME: _____ (please fill in one checklist per person)

- _____ T4 - Employment income
- _____ T4OAS - Old age security
- _____ T4A - Pension, retirement, annuity income
- _____ T4AP - Canada pension plan
- _____ T4RIF - RRIF income
- _____ T4RSP - RRSP income
- _____ T4E - EI benefits
- _____ T5 - Investment income (if joint, list % split below)
- _____ T3 - Trust income (if joint, list % split below)
- _____ T5008 - Statement of Securities Transactions
- _____ Details of securities/mutual fund redemptions
(Including Book Value of securities sold)
- _____ T5013 - Partnership income
- _____ **I sold my Principal Residence**
Sale price: \$ _____
Year of acquisition: _____

- _____ RRSP Contribution
- _____ Medical receipts
- _____ T2202A - Tuition credit
- _____ Child care expenses
- _____ Charitable donations
- _____ Support payments
- _____ Professional or union dues
- _____ Student loan interest statement
- _____ Claim teacher tax credit
- _____ \$ Rent or property taxes paid
- _____ Final tax installment statement
- _____ **I own foreign assets over \$100,000**
- _____ \$ Flat rate COVID home office expenses (max \$500)
Calculated as: \$2/day of work from home
- _____ T777S Detailed COVID home office expenses
- _____ T2200(s) - Declaration of Conditions of Employment
- _____ \$ Digital news subscription credit (max \$500)
- _____ **Ontario Staycation tax credit (include receipts)**

Yes	No	I authorize CRA to share my name and email with Ontario Health to be contacted about organ and tissue donation
<input type="checkbox"/>	<input type="checkbox"/>	

Changes from last year

- Email address
- Mailing address
- Marital Status
- Province of residency
- Country of residency
- Banking information (attach void cheque)

Dependant information (for tax credits)

Name	Date of Birth

Change of information / additional details:
