

U.S. TAX CHECKLIST

We want to make sure you get every tax credit and deduction you're entitled to.

So, before you get started on your taxes, make sure you have all the receipts and income records you need.

Here's a handy checklist:

U.S. Income Sources

- Employer (W-2)
- Unemployment (1099-G)
- Social Security (SSA-1099)
- Retirement plan distribution (1099-R or 1042-S)
- Interest (1099-Int)
- Dividends (1099-Div)
- Stock or mutual fund sale (1099-B)
- Self-employment / miscellaneous income
- Expenses from self-employment
- Rental property

U.S. Itemized Deductions

- Donated cash or goods to a charity
- Made a major taxable purchase
- Had a mortgage payment (1098)
- Paid property taxes
- Large out-of-pocket medical expenses

U.S. Household/Dependents

- Change in family or marital status
- Adopted a child
- Paid child / dependent care expenses

- Tuition (1098-T) and education expenses
- Paid student loan interest
- Enrolled in a health insurance plan through the federal or state marketplace (1095-A)
- HSA contribution

U.S. Miscellaneous

- Sold a home
- Paid / received alimony
- Lived in a federally declared disaster area
- Had gambling winning / losses
- Made an IRA contribution

Additional Canadian Information

- TFSA statements
- Mutual Fund statements
- T1 General



CANADIAN TAX CHECKLIST

We want to make sure you get every tax credit and deduction you're entitled to.

So, before you get started on your taxes, make sure you have all the receipts and income records you need.

Here's a handy checklist:

Slips

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- T2202 Tuition and Enrollment Certificate
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- All other information slips

Receipts

- RRSP contribution receipts
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses
(Tradespersons & apprentice mechanics)
- Other employment expenses
- Teacher's school supplies
- Medical expenses
- Home renovations (seniors and disabled)
- Charitable donations
- Political contributions
- Child care expenses
- Adoption expenses

Receipts (continued)

- Moving expenses
- Interest paid on student loans
- Carrying charges and interest expenses
- Office-in-home expenses
- Exams for professional certification

Other documentation

- Notice of Assessment/Reassessment
- Canada Revenue Agency correspondence
- Sale of principal residence
- Sale or deemed sale of stocks, bonds or real estate
- Northern residents deductions receipts
- Rental income and expense receipts
- Business, farm or fishing income/expenses
- Automobile / Travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification
- Search and Rescue volunteers certification
- Written certification for eligible educator school supplies
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