Personal Tax Return Checklist

Liberty Tax has compiled this list of income tax slips, receipts, and documentation to bring with you for your visit.

Income Tax Slips

Employers are required to have employment income slips prepared and mailed by February 28 to the address they have on file. If not received by March 8, check with your employer.

For T3 and T5 slips, your financial institution is required to mail them by March 15.

- ❑ T4 employment income
- ❑ Other income slips:
  - ❑ T4E Employment Insurance
  - ❑ T4A Pensions and annuities
  - ❑ T5007 Provincial assistance and WCB payments
  - ❑ T4A(P) Canada Pension Plan
  - ❑ T4A(OAS) Old Age Security
  - ❑ T4RSP & T4RIF RRSP and RIF income
  - ❑ T3 Trust income
  - ❑ T5 Investment income
  - ❑ T5018 Contract payments
- ❑ Other various income slips:
  - ❑ T4A-RCA, T4PS, T10, T101, T5008, T5013, T4FHSA, RC210, foreign income

Receipts

Canada Revenue Agency's (CRA) position is to disallow deductions and credits unless the taxpayer can prove they had the expense.

- ❑ Tuition slips T2202 (if transferring, ensure page 2 is signed accordingly)
- ❑ RRSP contribution slips
- ❑ Rent and/or property taxes (BC, MB & ON only)
- ❑ Medical receipts (e.g., prescriptions, dental, eyeglasses, etc.)
- ❑ Registered charitable donations
- ❑ Political donations
- ❑ Interest paid on student loans
- ❑ Professional and/or union dues
- ❑ Carrying and interest expenses for investments
- ❑ Spousal support payments/income received (for payment deduction, a copy of court order is required)
- ❑ Attendant care expenses (for individuals with disabilities)
- ❑ Moving expenses (minimum move of 40 km for employment or education)

Children

- ❑ Dependant information
- ❑ Childcare expenses
- ❑ Adoption expenses
- ❑ Child support received

Professional

- ❑ Office in home (requires T2200 signed by employer)
- ❑ Tradespersons tool expense receipts
- ❑ Auto expenses

Other Information

- ❑ Copy of last Notice of Assessment (NOA)
- ❑ Northern Residents Deductions
- ❑ Clergy Residence Deduction (T1223)
- ❑ Capital gains/Adjusted cost base (ACB required for disposed stocks)
- ❑ Sold principal residence (information regarding the sale)
- ❑ Rental property (income and expenses)
- ❑ Sale of rental property
- ❑ Self-employed (income and expenses including GST/HST information)

What to Expect

With Liberty Tax, you can rely on real help from real people–and services and solutions with real benefits. Get the services you need, the refund you want, and the experience you deserve.

Upon arriving at a Liberty Tax office, you will be asked to authorize the office to be your representative at Canada Revenue Agency through either your MyAccount at CRA or with your most recent Notice of Assessment (NOA). We will also ask for 2 pieces of identification, one must be a photo ID.

You will be asked a series of questions to ensure Liberty obtains the highest refund possible for you.

We will then prepare your tax return, provide you with a copy for your records, and will ask you to sign form T183 authorizing us to electronically file your return.

Revised August 1, 2025