

WHAT TO BRING

FORM GA-06 · T1 DOCUMENT CHECKLIST

EVERY RETURN STARTS HERE

- ☐ Most recent notice of assessment – carries RRSP room and carryforwards
- ☐ SIN and date of birth – you, spouse, dependants (first year only)
- ☐ Last year's return (new clients only)
- ☐ Any CRA letters from the year
- ☐ Changes – address, marital status, dependants, first home
- ☐ Instalment payments made, with dates and amounts

IF YOU'RE EMPLOYED

- ☐ T4 from every employer
- ☐ T4E if you collected EI
- ☐ T5007 for WSIB or social assistance
- ☐ Union or professional dues receipts
- ☐ T2200 + expense summary (if your employer requires expenses)

IF YOU WORK FOR YOURSELF

- ☐ Income records – invoices or a yearly summary
- ☐ Expenses grouped by category – a spreadsheet is perfect
- ☐ Vehicle log – business km and total km, plus costs
- ☐ Home office – workspace and home square footage, costs
- ☐ Equipment purchases over a few hundred dollars
- ☐ HST returns filed, if registered

IF YOU INVEST

- ☐ T5 – interest and dividends
- ☐ T3 – trusts and mutual funds
- ☐ T5008 – securities sold + what you originally paid
- ☐ RRSP and FHSA contribution receipts
- ☐ Crypto activity – complete Form GA-02 (exchanges, wallets, exports)

HOME & FAMILY

- ☐ Childcare receipts, with provider's SIN or BN
- ☐ Medical and dental receipts
- ☐ Donation receipts
- ☐ T2202 tuition certificate
- ☐ Rent or property tax paid (Ontario Trillium Benefit)
- ☐ Home sale details, if you sold – even a principal residence

RETIREMENT & OTHER

- ☐ T4A(OAS) and T4A(P) – OAS and CPP
- ☐ T4A – pensions, annuities, other income
- ☐ T4RSP / T4RIF – registered withdrawals
- ☐ Foreign pension or income statements
- ☐ Support paid or received – agreement and amounts

Missing something? Send what you have. Most slips are also in CRA My Account, and we tell you exactly what's still outstanding – you never have to guess.