



Provided by
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Checklist

INCOME		
● Employment	T4	RL1
● Old Age Security	T4A (OAS)	
● Quebec pension	T4A(P)	RL2
● Other pensions	T4A	RL1-RL2
● Employment Insurance	T4E	
● RRSP withdrawal	T4RSP	RL2
● RRIF withdrawal	T4RIF	RL2
● Interest and dividends	T5	RL3
● Trust and mutual fund	T3	R16
● Statement of business income and expenses (self-employed worker)	NEQ	
INVESTMENTS AND REAL ESTATE		
● Rental property statement of income and expenses		
● Details of property maintenance costs	TP-1086	
● Disposal of securities (not in an RRSP or TFSA)		
● Cryptocurrency transactions (Bitcoin, Ether, etc.)		
● Upgrade of residential waste water treatment installation (over \$2,500)		
● Sale of residence or property	Contracts	
● Purchase of a residence	Tax bill	
● Foreign property or shares (+ C\$100,000)	T1135	

DEDUCTIONS AND CREDITS			
● RRSP			Slip
● Documents relating to HBP	T4RSP		RL2
● Union and professional dues			
● Donations and political contributions			Receipt
● Interest paid on a student loan			
● Solidarity	Mun. tax no.		RL31
● Employment and telework expenses	Days: T2200		TP64.3
● Financial expenses and interest expenses			
● Frais financiers et frais d'intérêts			
● Medical expenses	Receipts and summary drug store/insurance		
● Medical expenses, remote region (+ 40 km)			
FAMILY, SENIORS AND STUDENTS			
● Expenses for children's sports or artistic activities ²			Receipt
● Childcare expenses	Receipt		RL24
● Tuition fees	T2202A		RL8
● Transfer of tuition credits to parents			
● Expenses for senior's sports or artistic activities (70 years or over) ³			
● Home accessibility expenses ¹			
● Home support expenses			Lease
● Caregiver (relative with a major impairment or a parent aged 70 or older)			
● Disability tax credit			

Important! Include most recent notices of assessment for all family members

Instalments paid	2021 Canada	2021 Quebec	2022 Canada	2022 Quebec
Client:				
Spouse:				
Tax information				
Yes	Purchase of first principal residence If so:		% of credit for client	% for spouse
	Sale of principal residence			
	Change of address:			
	Spouse not retired	Net income:	Federal (L 23600): \$	Provincial (L 275): \$
	Change in marital status	Date:	New status:	
	Did you live alone throughout 2021? (Excluding dependents)			
	Foreign property with a cost of more than C\$100,000 in 2021			
Primary	Yes	Spouse	Yes	If so: Brokers foreign property statement

Notes and change in situation

¹ For disabled person or person 65 years of age on December 31, 2021. Renovations to move around or carry out activities of daily living or reduce the risk of injury in the home.

² Family income less than \$142,685. Child born between January 1, 2005 and December 31, 2015.

³ Individual annual income less than \$43,480. Client/spouse 70 years of age or more on December 31, 2021.