



## RHLLP 2025 Personal Tax Checklist

To better assist you this tax season, please provide any of the following applicable information. When you think you have received all your tax paperwork and are ready to have your taxes prepared, you can:

1. Drop your information off at either of our locations below;
2. Mail your information to either of our locations below;
3. Email this email with your electronic information; or
4. Call the office to make other arrangements.

### Tax Slips

- **T4** - Employment Income
- **T4E** - Employment insurance benefits
- **T4A** – Pension and Annuity income
- **T4A(P) / T4A(OAS)** – CPP and OAS slips
- **T3, T5, and T5008** – Investment income
- **T2202** or **TL11** – Tuition
- **T5007** – Social assistance and worker’s compensation
- **T4RSP, T4RIF** – **RRSP** and **RIF** income
- **T5013** – Partnership Income
- Any other slips

### Receipts

- Charitable and political donations
- RRSP Contributions
- Medical expenses
- Childcare expenses
- Adoption expenses
- Student loan interest
- Professional or union dues (not included on T4)
- Investment advisor fees and interest expenses
- Moving expenses
- School supply expenses (Teachers)
- Tool expenses
- **T2200** – Employment expenses
- Home renovation/accessibility expenses

### Other Documents

- Other CRA correspondence
- Previous year tax return – if we did not prepare
- Instalment payment amounts
- Information concerning your dependents
- Capital gains information if no T5008 slip
- Child support or alimony
- Home buyers plan and lifelong learning plan
- Sale of your principal residence
- Disability tax credit (DTC)
- Rental property – income and expenses
- Self-employed people and commissioned employees – income and expenses
- Volunteer firefighter’s or Search and Rescue certificate
- Northern residents’ information
- Business investment loss information
- Foreign pension information or slips