

Federal and Quebec personal checklist.

- T4 and RL 1(Qc) employment income.
- Statement 31 (if you are a tenant, this document will be given to you by your landlord).
- PCU or PCRE income (T4A or T4E) • Investment income (T5 and T3).
- RRSP or RRIF withdrawals (T4RSP and T4RIF).
- Any other slip proving income.
- Foreign income • Capital gain or loss.
- Rental income and expenses.
- Alimony received for your benefit (and not for your children, as it is not taxable) • Alimony paid for your ex (as it is not deductible for children) • Receipts for childcare expenses (Relevé 24 – mandatory for the tax authorities).
- Contribution to RRSP.
- Receipts for charitable donations and political contributions • Medical expenses and insurance premiums • Copies of “federal and state” installments paid during the year.
- Your income and expense summary sheet, if you are self-employed or work from home.
- Tuition fees (T2202).
- Amount for disabled persons.
- Interest paid on a student loan.
- Interest and financial charges paid for the purpose of generating income • Tax receipt for children's activities (children under 16).
- Union and professional contributions.
- Reimbursement to your RAP (home ownership plan).
- If you purchased a home during the year and neither you nor your spouse owned a property in the past 5 years, you are entitled to a credit for the purchase of your home for the tax year. Please mention it to us when you come to our office.
- If you are a volunteer firefighter, please let us know when you visit our office. A tax credit awaits you.
- If you are a “non-resident”, you must tell us.
- Statement 19; if you received an advance payment from Revenue Québec for childcare expenses or work premium.

- If you pay child support (whether the support is deductible or not), you cannot take that same child into your care.
- If you hold foreign assets costing more than CDN 100,000; It is important to mention it to us and provide us with the information.
- If you received taxable salary insurance during the current year, ask your company's payroll department to provide you with the sum of premiums paid for salary insurance for previous years. Ask your employer to provide you with this data in writing.
- If you are 65 years old, have owned a primary residence for 15 years or more, and your household income is less than \$50,000, you may have received a letter from your city if you experienced a tax increase of more than 13.56%. You may be entitled to additional credit for this.
- If you sold your main residence during the year, you must tell us. Although not taxable, you must declare the sale of this in your tax return.
- If you declared bankruptcy during the year, we must provide you with a copy of your pre-bankruptcy declaration (i.e. before the day of your bankruptcy). This is usually produced by your bankruptcy trustee.
- If this is a declaration for a deceased person, bring us a copy of the death certificate and a copy of the will.
- If you have received, exchanged or sold cryptocurrencies, you must inform us when you visit our office.

**This list is not complete. Other documents and information may be required.*