

Memory Aid for your income tax returns

We recommend you check the items which may apply to your situation and then gather all the relevant documents before doing your tax return or before talking with tax preparer.

1 - First name : _____ Last name : _____

DOB : ____/____/____ SIN : ____/____/____ Main Language : French English

2 - First name : _____ Last name : _____

DOB : ____/____/____ SIN : ____/____/____ Main Language : French English

Your Marital status... Did it change in the last Return year? Yes No

Married Common Law Divorced Separated Single Widowed Date : ____/____/____

Current Address : Is it the same as your T4? Yes No

Current province of residence : _____ Province of residence as of Dec. 31st : _____

Is your current address the same as last year? Yes No

If **NO** : Date of change : ____/____/____ Previous province of residence _____

Address : _____ Postal Code : _____ - _____

Town : _____ Prov. : _____

1 - E-mail : _____ Ph. : _____

2 - E-mail : _____ Ph. : _____

Did you sell a property in the last calendar year? Yes No

If **YES** : Year of purchase _____ Date of selling ____/____/____

Purchase price \$ _____ Selling price \$ _____

Did you live in the residence for full time of ownership? Yes No

If **NO** : Years of residence _____ Years of rental _____

Ownership : Sole Joint. Joint name. _____

Address of house sold : _____

RRSP receipt(s)? Yes No T2202 for post-secondary education? Yes No

Medical fees? Yes No (Please provide a summary from Insurance Co or Drug Store)

Dependent children _____ (Do a list on another page with : Name, First name, Date of birth and SIN)

Shared Custody ? Yes No Details : _____

Important Documents

- 1 – Notice of assessment QC (form previous tax year)
Income tax return QC et Federal (from previous year – new client)
- 2 – Installment Payment

For your income (if applicable)

- 3 – Income slip (T4 / RL1)
- 4 – Business or Professional income
 - **Commissions received and Tips**
If you are self-employed or have a small unincorporated business, ask for document (T2125) to know what information, you require (T2125)
- 5 – Wage-loss indemnity received (T4A)
- 6 – CNESST / WSIB (T5007)
- 7 – Quebec pension plan QPP / Canada pension plan PPC (T4A (P))
- 8 – Old Age Security pension OAS (T4A (OAS))
- 9 – Scholarships RESP
- 10 – Withdrawal : RRSP, RRIF, LIF (T4RSP)
- 11 – Pension fund and others annuity (T4A)
- 12 – Employment Insurance (T4E)
- 13 – Social assistance payments (T5007)
- 14 – Compensation from SAAQ (T5007 / RL5)
- 15 – Taxable Benefits (Stock options)
- 16 – Income : Interest, Dividends, saving bonds (T3 / T5)
- 17 – Capital Gains or Losses (T5008)
- 18 – Quebec Parental Insurance Plan QPIP (RL6)
- 19 – Prepayment (Daycare expenses, bonus at work, home maintenance (RL19)
- 20 – Alimony or child support (Usually, the pension for child is not taxable and not deductible)
- 21 – Real Estate Rentals : (Building rental or part of the residence) (Fill form T776)
- 22 – Home Telework : over 50% of time, (4 following weeks) Yes No
- 23 – Ownership of foreign property which exceeds \$100,000 (Fill form T1135)
- 24 – Other income, investments, specify : _____

For your deduction and credits (If you qualify)

- 25 – Medical expenses, Dental care, Glasses, etc. (Drugstore or Insurance Co statement, receipts)
 - **Also, traveling expenses for appointments over 40km or over 80 km from your home**
 - **Need a proof of the appointments for all travelling expenses**
- 26 – Premium paid for hospitalization insurance outside Canada
- 27 – What is your drug coverage plan ? RAMQ Private
- 28 – RRSP (Contribution)
- 29 – HBP or LLP to reimburse (See Federal notice of assessment)
- 30 – Charitable donations (First time after 2007 ? Yes No)
- 31 – Donations in kind (i.e. Stocks or mutual funds)
- 32 – Childcare expenses (RL24 or RL30)
- 33 – Summer Camp
- 34 – Babysitter receipts
- 35 – Adoption fees or infertility treatment
- 36 – Tuition fees (T2202 / RL8)
- 37 – Legal fees (initial fees, payments) for support payments
- 38 – Taxable Alimony payment paid
- 39 – First time home buyer's tax credit
- 40 – Sale of your principal residence (see the first page)
- 41 – Home renovation program (When you qualify for tax credit)

- 42 – Tax credit for upgrading of residential waste water treatment systems
- 43 – Financial expenses and interest paid (for investment income)
- 44 – Moving expenses
- 45 – Interest paid on a student loan
- 46 – Investments in a labor-sponsored fund (FTQ, Fondation CSN, etc.)
- 47 – “Capital regional et cooperatif Desjardins” shares
- 48 – Property tax statement (Tenant : RL31 in QC / Owner : registration no on Municipal taxes statement)
- 49 – Tax credit for contributions to political parties
- 50 – Expenses related to the job (employment tradesperson, salaried and commissions employees)
- 51 – Union or professional dues (see T4 / RL1)
- 52 – Tax credit for senior’s activities – QC (70 years and over)
- 53 – Tax credit for home-support services for seniors – QC (70 years and over)
- 54 – Senior Home accessibility tax credit (HATC) (65 years and over)
- 55 – Senior assistance tax credit – QC (70 years and over)
- 56 – CWLB – Canada Worker Lockdown Benefit
- 57 – Covid 19 Aids programs : CRB, CRSB, CRCB, or others
- 58 – Disability tax credit (DTC)
- 59 – Tax credit for top-level athletes
- 60 – Tax credit for recent graduates working in remote resource regions (QC)
- 61 – Tax credit for Volunteer Firefighter or search and rescue volunteers
- 62 – Other deductions or credits, specify : _____
- 63 – Grant for seniors to offset a municipal tax increase (QC) If you were 65 years old and has owned your residence at last 15 consecutive years.
 - **You could qualify for this tax credit (see the letter you received with municipal taxes) QC**

Important Notes :

Do not separate copies of Taxes receipts like (T4, T5, etc.)

You must report your income from all sources. Domestic and foreign. Vous devez déclarer vos revenus de toutes sources, canadiennes et étrangères.

You need help ? : 1 877 620 2256

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