

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.