



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				
	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		Spouse		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.