

# Impôtaxe

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## Required Documents – Individuals

Here is a list, not exhaustive, of the documents to submit to us so that we can optimize your taxes!  
You can also submit your documents by email or fax.

### GENERAL

- ☐ The “New Client Interview” form – *new clients only*
- ☐ Last notice of assessment received from the Canada Revenue Agency and Revenu Quebec – *new clients only*
- ☐ Latest income tax returns filed (federal & provincial) – *new clients only*
- ☐ Correspondence received from the Canada Revenue Agency and Revenu Quebec
- ☐ Amount of installments paid to the Canada Revenue Agency & Revenu Quebec
- ☐ Void check if you are not yet registered for direct deposit (or to modify your information)
- ☐ [Revenu Quebec download code](#) – *new clients only*

### INCOME

- ☐ T4 / RL-1: Employment Income (Statement of Remuneration Paid)
- ☐ T4E / RL-6: Statement of Employment Insurance and Other benefits
- ☐ T5007 / RL-5: Social assistance, workers compensation benefits and indemnities
- ☐ T4A(OAS): Statement of Old Age Security
- ☐ T4A(P) / RL-2: Statement of Canada/Quebec Pension Plan Benefits
- ☐ T4A / RL-2: Statement of Pension, Retirement, Annuity or Other Income
- ☐ T4RSP: Statement of RRSP Income
- ☐ T4RIF: Statement of Income from a Registered Retirement Income Fund
- ☐ T3 / RL-16: Statement of Trust Income Allocation and Designations
- ☐ T5 / RL-3: Statement of Investment Income
- ☐ T5008 / RL-18: Statement of Securities Transactions
- ☐ RC62: Universal Child Care Benefit Statement (UCCB) - *for 2016 and previous tax years*
- ☐ RL-19: Advance Payments of Tax Credits
- ☐ RL-30: Subsidized Educational Childcare- *for 2018 and previous tax years*
- ☐ NR4: Statement of Amounts Paid or Credited to Non-Residents of Canada
- ☐ If you sold your residence in the year (year of purchase, purchase price, date of sell & selling price)

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## DEDUCTIONS/CREDITS

- ☐ RRSP contributions made during the tax year and the first 60 days of the following year
- ☐ Medical expenses (get an annual statement from the pharmacy and the total expenses not reimbursed by your private insurance)
- ☐ Donations & political contributions (last 5 years if not yet deducted)
- ☐ T2202A/RL-8: Tuition and Education Certificate
- ☐ Interest paid on your student loans (last 5 years if not yet deducted)
- ☐ Public Transit (Bus/metro passes) - *before July 1<sup>st</sup>, 2017*
- ☐ Union and Professional amounts not included on a T4 slip
- ☐ Childcare expenses (RL-24 slip or other receipts)
- ☐ Children's Fitness and Arts amounts
- ☐ T2201: Disability Tax Credit Certificat
- ☐ RL-31: Information about a leased dwelling (slip given by your landlord if you're a tenant) or roll number/cadastral designation shown on your municipal tax bill (if you're an owner) and you're eligible for the Solidarity Tax Credit
- ☐ (Residents of Ontario): amount paid in rent property taxes for the year
- ☐ RénoVert Tax Credit
  - Complete and bring the form: [RénoVert Tax Credit \(TP-1029.RV-V\)](#)  
The following form completed and signed by the contractor who carried out the renovation: [Certificate of Compliance with Energy and Environmental standards \(TP-1029.RV.A\)](#)
- ☐ Eligible educator school supply tax credit: If you were an eligible educator, you can claim up to 1000\$ for eligible school supplies. ([see link](#))

## NEWCOMERS

- ☐ All your study or work permits obtained since your arrival
- ☐ Your income ([converted into Canadian dollars](#)) before your arrival in Canada for each of the following periods
  - From January 1st, 2020 to the date of your arrival in Canada
  - From January 1st, 2019 to December 31<sup>st</sup>, 2019
  - From January 1st, 2018 to December 31<sup>st</sup>, 2018