

Tax Season Document Checklist (Canada)

What to have ready before you (or your accountant) start your return.

Income

- ☐ All T4 and T4A slips received
- ☐ Total sales/revenue report from your bookkeeping software
- ☐ Records of any other business income

Expenses

- ☐ Categorized expense report for the year
- ☐ Receipts for all deductible purchases
- ☐ Kilometre log if you deduct vehicle use
- ☐ Home office measurements if you claim that deduction

Payroll & Contractors

- ☐ Payroll remittance summaries (PD7A, T4 Summary)
- ☐ T4A slips sent to contractors paid for services

Prior Year & Admin

- ☐ Last year's tax return (T1 or T2) for reference
- ☐ Instalment payments made this year
- ☐ BN and business formation documents on hand