

CHECKLIST – TAXES 2025

Non-exhaustive list - This list is to help you prepare your file.

You do not have to return it to us

WORKERS

- ☐ Record of Employment (T4 / RL-1 Slip, T4PS / RL-25 Slip).
- ☐ Other employment income, salary insurance, severance pay (T4A / RL-1 Slip).
- ☐ Construction Employees (RL-22 Slip).
- ☐ CNESST statement (T5007 / RL-5 Slip).
- ☐ Employment Insurance Statement (T4E).
- ☐ Professional or union dues other than on the T4.
- ☐ Meal expenses for truckers (TL2 / TP-66 signed by the employer as well as details of meal expenses).
- ☐ Employment Expenses such as car or office-in-home expenses¹.
- ☐ Statement of Advance Payments for the Work Premium and the Canada workers benefit (RC410 / RL-19).
- ☐ Tips not reported on your RL-1 Slip.
- ☐ Tool expenses (tradespeople).
- ☐ Eligible expenses for school supplies for teachers and early childhood educators.
- ☐ Training expenses.

PERSONS OVER 65

- ☐ Statement of Old Age Security and Guaranteed Income Supplement (T4A (OAS)).
- ☐ Québec Pension Plan statements (T4AP / RL-2 Slip).
- ☐ Pension statements (T4A / RL-2 Slip).
- ☐ RRSP withdrawals, HBP (Home Buyer's Plan) (T4RSP / RL-2 Slip).
- ☐ RRIF withdrawals (T4RIF / RL-2 Slip).
- ☐ If you have lived in your home for more than 15 years and have a family income of less than \$64,200: form issued by the municipality regarding the municipal tax increase credit (form attached to your **2026** municipal tax bill or noted on the bill itself).
- ☐ Fees for [home accessibility](#) or [seniors' independence](#) (for examples of eligible expenses, see the links²).
- ☐ Home support charges for people aged **70 and over** (receipts if you are an owner, amounts paid for your rent if you are a tenant [excluding a PSR], RL-19 Slip for tenants of a PSR or copy of your lease and schedule to the lease, form TPZ-1029.MD.5 for condo owners).

FAMILIES

- ☐ Québec Parental Insurance Plan statement (T4E / RL-6 Slip).
- ☐ Childcare receipts (RL-24 Slip). If you received advance payments, you must provide the RL-19 Slip.
- ☐ Receipts of physical and artistic activities for children.
- ☐ Adoption or treatment of infertility expenses.
- ☐ Mention any change of custody (father, mother or other) for each child.

STUDENTS

- ☐ Tuition Fees (T2202A / RL-8 Slip). *Do not forget to print them on your student portal.* If the fees are transferred to a parent, you must sign the appropriate section, often on the back of the T2202A.
- ☐ Interest on student loans.
- ☐ Scholarship statement and research grants.

INVESTORS

- ☐ Statement of Investments (T5 / RL-3 Slip, T3 / RL-16 Slip, T5008 / RL-18 Slip, documents concerning the purchase or sale of shares, foreign incomes, interests on income tax refunds). *The deadline for receipt for T3 is March 31.*
- ☐ RRSP and VRSP (**wait for the receipts of the first 60 days of 2026**), FHSA, Workers Fund, Capital régional et coopératif Desjardins.
- ☐ Financial expenses (interest paid to earn investment income, fees paid to an investment advisor).
- ☐ Sale of securities (T5008).
- ☐ Cryptocurrency or virtual currency transactions
- ☐ All information required when you have a capital gain or loss for OUT-RRSP or OUT-TFSA securities (analysis provided by your broker or cost and date of purchase of your securities).

OTHER DEDUCTIONS

- ☐ Solidarity Tax Credit: provide RL-31 Slip if you are a tenant or the registration number, only if you have moved, of your municipal tax bill if you are an owner.
- ☐ Charitable donations receipts.
- ☐ Political contributions receipts (federal and municipal political parties only).
- ☐ Medical expenses¹.
- ☐ Indicate if you purchased a first home (either via the client questionnaire or via Dimpo).
- ☐ Indicate if you sold your house¹.
- ☐ Mention if you are a caregiver even if the person receiving your help does not live with you.
- ☐ Mention if you have a physical limitation restricting you in your daily tasks (having difficulty to walk is the deduction most often forgotten).
- ☐ Volunteer firefighters and search and rescue volunteers (letter indicating your number of hours).
- ☐ Non-tax-exempt support paid.
- ☐ Certificate of compliance for the tax credit for the upgrading of residential wastewater treatment systems (e.g., replacement of the septic system).
- ☐ Moving expenses¹.

OTHER INCOMES

- ☐ Statement of the SAAQ (RL-5 Slip).
- ☐ Social assistance record (T5007 / RL-5 Slip).
- ☐ Interest income (including those from tax refunds).
- ☐ Detail of non-tax-exempt support received.
- ☐ Rental income¹. Include Desjardins dividends.
- ☐ Business income^{1, 3}.
- ☐ Foreign income (investments, pensions, etc.).
- ☐ Capital gains (sale of shares, sale of a second home, land, etc.).
- ☐ Indicate if you own foreign goods totalling more than \$100,000 (real estate, share on the stock market).

OTHER INFORMATION TO BE PROVIDED

- ☐ All documentation received from governments during the year.
- ☐ Check specimen if you want to register for direct deposit or if this is your first income tax returns.
- ☐ Instalments paid.

NOTES

¹ Please fill out the appropriate form by downloading it from my website (www.cpcomptable.com).

² **Home accessibility:** www.canada.ca > search for "home accessibility" using the magnifying glass and select "Line 31285 – Home Accessibility Expenses". You will see the section "Expenses you can claim".

Seniors' independence: www.revenuquebec.ca > search for "examples independent living" using the magnifying glass and select "24. Independent Living Tax Credit for Seniors (Line 462)". You will see a list of examples.

³ For business income, you can attach your financial statements or enter the required information directly on the Dimpo platform, instead of completing the dedicated form available on my website.