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# 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 expenses<sup>1</sup>.
- 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 links<sup>2</sup>).
- 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 expenses<sup>1</sup>.
- Indicate if you purchased a first home (either via the client questionnaire or via Dimpo).
- Indicate if you sold your house<sup>1</sup>.
- 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 expenses<sup>1</sup>.

## **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 income<sup>1</sup>. Include Desjardins dividends.
- Business income<sup>1, 3</sup>.
- 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**

<sup>1</sup> Please fill out the appropriate form by downloading it from my website ([www.cpcomptable.com](http://www.cpcomptable.com)).

<sup>2</sup> **Home accessibility:** [www.canada.ca](http://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](http://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.

<sup>3</sup> 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.