

2026 Personal Tax Document Checklist

For your 2026 tax return (filed in 2027). Tick what you have, then send it our way.

Start here

Please complete our [Personal Tax Questionnaire](#) online (or download it from the same page).

Income slips

- ☐ Employment income – T4
- ☐ Employment insurance benefits – T4E
- ☐ Pension and annuity income – T4A
- ☐ Other T4A income (scholarships, fees, commissions)
- ☐ CPP slips – T4A(P)
- ☐ Old Age Security slips – T4A(OAS)
- ☐ Investment income – T3, T5 and T5008
- ☐ Partnership income – T5013
- ☐ Contract payments – T5018
- ☐ Social assistance and workers' compensation – T5007
- ☐ RRSP and RIF income – T4RSP and T4RIF
- ☐ Foreign income slips and foreign tax paid
- ☐ Any other income slips

Other slips and expenses

- ☐ RRSP contribution slips (March to December 2026, and the first 60 days of 2027)
- ☐ FHSA contributions (January to December 2026)
- ☐ Medical expenses
- ☐ Charitable and political donations
- ☐ Child care expenses
- ☐ Adoption expenses
- ☐ Moving expenses
- ☐ Home accessibility expenses
- ☐ Investment advisor fees
- ☐ Student loan interest

Other documents

- ☐ Last year's tax return (if we didn't prepare it)
- ☐ Last year's notice of assessment from the CRA (if we don't have CRA access)
- ☐ Other CRA letters or notices
- ☐ Tax instalment payment amounts
- ☐ RRSP and FHSA statements
- ☐ Union or professional dues receipts (if not on your T4)
- ☐ Your dependents' names and dates of birth
- ☐ Spouse or partner's name, date of birth and net income
- ☐ Sale of your principal residence
- ☐ Child support or spousal support information
- ☐ Tuition certificate – T2202
- ☐ Home Buyers' Plan (HBP) and Lifelong Learning Plan (LLP) information
- ☐ Disability tax credit certificate
- ☐ Volunteer firefighter or search and rescue volunteer certificate
- ☐ Foreign property costing over \$100,000 CAD at any time in 2026 (T1135)
- ☐ Crypto transaction history
- ☐ Rent paid, if you rent in BC (address, months and landlord's name)

Employment expenses

Employees: these need a signed Form T2200 from your employer.

Employees earning a salary

- ☐ Allowable motor vehicle expenses
- ☐ Food and beverage expenses
- ☐ Lodging expenses
- ☐ Office rent
- ☐ Parking expenses
- ☐ Professional or union dues
- ☐ Supplies (office supplies)
- ☐ Telephone and internet expenses
- ☐ Tools expenses
- ☐ Work-space-in-the-home (see our [Work-Space-In-The-Home Questionnaire](#))

If this applies to you

- ☐ Rental property owner: complete our [Rental Property Questionnaire](#)
- ☐ Self-employed: your 2026 income, expenses and vehicle log
- ☐ Self-employed, QuickBooks Online: give us access to your QuickBooks Online subscription
- ☐ Self-employed, other software: ask us for a customized list of income items and deductions

Employees earning commission income

Everything in the salary list, plus:

- ☐ Accounting and legal fees
- ☐ Advertising and promotion
- ☐ Entertainment
- ☐ Training costs
- ☐ Travel

Sending and dates

How to send us your documents

Upload them to TaxFolder through our [Client Portal](#), then click "I'm Finished" when you're done.

Please send us your documents by

Key dates for your 2026 return

March 1, 2027: last day for RRSP contributions to count for 2026.

April 30, 2027: file and pay any balance owing.

June 15, 2027: filing deadline if you or your spouse or partner are self-employed. Any balance owing is still due April 30.

Not sure if something applies? Send it anyway and we'll sort it out.