

MyBookly 2023 Checklist

We're here to help you maximize your refund. Use our checklist to help gather your documents.

Tax Slips

- Employment income (T4) Employment insurance benefits (T4E) Pension and annuity income (T4A)
- CPP and OAS slips (T4A(P) and T4A(OAS)) Investment income (T3, T5, and T5008) Tuition (T2202 or TL11)
- Social assistance and worker's comp (T5007) RRSP and RIF income (T4RSP, T4RIF) Partnership income (T5013)
- T2200 (if provided from employer) Any other tax slips

Receipts

- Charitable and political donations
- RRSP contributions
- Medical expenses Childcare expenses
- Children's fitness and arts expenses (MB, YT) Adoption expenses
- Student loan interest Professional or union dues (if not included on your T4)
- Investment advisor fees and interest expenses
- Moving expenses (if more than 50km from original address)
- School supply expenses (teachers)
- Tools expenses
- Employment expenses & form T2200 Examination fees for professional designations
- Rent or property tax (ON, MB)
- Legal expenses to collect alimony, pension or retiring allowance.
- Home renovation/accessibility expenses (if a senior or eligible for the disability tax credit)
- Transit passes (Ontario seniors only)

Other Documents

- Last year's notice of assessment from the CRA
 - Tuition carry forward amounts
 - RRSP deduction limit and unused amounts
- Loss carry forward amounts
- Other CRA correspondence
- Last year's tax return (helpful for first time users)
- Instalment payment amounts Information about your dependents
 - Birthday and net income
 - Post-secondary tuition available for transfer
- Capital gains information (if no T5008 slips)
- Child support or alimony information
- Home buyers' plan and lifelong learning plan information
- Information about the sale of your principal residence
- Disability tax credit certificate
- Rental property income and expenses
- Self-employed people and commissioned employees
 - Income and expenses
 - Vehicle logbook
 - In-home office expenses
- Volunteer firefighter's or search and rescue volunteer certificate
- Northern residents information Business investment loss information (if you invested in a company that went bankrupt) Rent Assist information (MB)
- T777S and T2200S if working from home due to COVID-19 (for years 2020 to 2021)
- Crypto Wallet ID