

# Get Organized

To make sure nothing falls through the cracks, organize your paperwork with an accordion file folder big enough to hold the following documents.

## Tax Information Slips

For example:

- T4** – employment income
- T4A** – RESP payments, pension income, lump-sum payments, self-employed commissions or annuity income
- RSP/RRSP** contribution receipt
- T3** – income from a trust
- T5** – investment income like dividends or interest
- T5008** – securities transactions
- T5013** – income from a limited partnership
- T2202A** – post-secondary tuition and enrollment certificate



## Receipts For:

- Charitable donations**
- Medical expenses**
- Childcare expenses**
- Annual union or professional dues**
- Any other receipts that are relevant to your tax situation**



## Records Related To:

- Investments.**  
Investment income and expenses are reported on Schedule 4. Any capital property, like stocks, that you sold at a profit (or loss) would be reported as a capital gain (or loss) on Schedule 3.
- Rental properties.**  
Rental income must be reported by completing Form T776.
- Business income and expenses.**  
If you're a freelancer or a sole proprietor running an unincorporated business, you must calculate the **net income from your business** and report it on Form T2125.

