SAGEBOOKS · PERSONAL TAX

2026 Tax Return Document Checklist

Sagebooks

Everything to gather before your 2026 personal tax return: slips, receipts, self employed and rental records.
Tick each item as you add it to your private Google folder.

About you

- [ ] Your SIN, date of birth and address
- [ ] Spouse and dependant details
- [ ] Your 2025 Notice of Assessment
- [ ] Any CRA letters received

Income slips

- [ ] T4, T4A, T4E (EI)
- [ ] T4A(P) (CPP), T4A(OAS)
- [ ] T5 and T3 (investments)
- [ ] T5008 (sales of investments)
- [ ] T5007, T4RSP or T4RIF

Deductions and credits

- [ ] RRSP and FHSA receipts
- [ ] T2202 (tuition)
- [ ] Medical receipts
- [ ] Donation receipts
- [ ] Childcare receipts
- [ ] Union or professional dues
- [ ] Moving expenses
- [ ] Support payments
- [ ] Rent paid or property tax (for the Ontario Trillium Benefit)

Self employed

- [ ] Total sales
- [ ] Expenses by category
- [ ] Vehicle kilometre log
- [ ] Home office size
- [ ] Equipment bought
- [ ] HST filed and paid
- [ ] Instalments paid

Rental property

- [ ] Rent received
- [ ] Mortgage interest
- [ ] Property tax
- [ ] Insurance
- [ ] Utilities
- [ ] Repairs

Bought or sold

- [ ] A home, investments or crypto during the year

New to Canada or left

- [ ] Your arrival or departure date and world income for the year