Count myAccount

2026 Tax Year

SENIOR TAX CHECKLIST

Retirees & Pension Income

Check off everything that applies, gather those documents, and send them to us.
Married or common-law? We can split eligible pension income to lower your combined tax – just tell us.

A ABOUT YOU

- [ ] Social Insurance Number (SIN)
- [ ] Full legal name, date of birth, address & postal code
- [ ] Marital status (and date of any change this year)
- [ ] Spouse / common-law partner: name, SIN, DOB, net income
- [ ] Direct deposit: void cheque OR account / transit / institution number
- [ ] Last year's Notice of Assessment (new clients)
- [ ] Any CRA letters or correspondence received this year

B INCOME SLIPS – all you received

- [ ] T4A(OAS) – Old Age Security
- [ ] T4A(P) – CPP / QPP benefits
- [ ] T4A – employer pension, annuities, other income
- [ ] T4RSP / T4RIF – RRSP / RRIF withdrawals
- [ ] T4 – employment income (if still working)
- [ ] T5 – interest, dividends, investment income
- [ ] T3 – trust or mutual-fund income
- [ ] T5007 – social assistance / workers' compensation
- [ ] Foreign pension income (e.g. U.S. Social Security)

C DEDUCTIONS & CREDITS – keep receipts

- [ ] Medical expenses (prescriptions, dental, attendant / nursing-home care)
- [ ] Disability Tax Credit (T2201) – you or your spouse
- [ ] Home Accessibility expenses (safety / mobility renovations)
- [ ] RRSP contributions (if you have earned income and are under 72)
- [ ] Charitable & political donation receipts
- [ ] Canada Caregiver – supporting a dependant with an impairment
- [ ] Support payments made or received (with written agreement)
- [ ] Rent or property tax paid – for provincial credits (if eligible)

D SIGN & RETURN – we send these to you

- [ ] CMA-IND-101 Intake Form – completed & signed
- [ ] Privacy Policy – signed
- [ ] Authorization Form (AUT-01) – signed, lets us file for you