



CANADIAN TAX CHECKLIST

We want to make sure to maximize your refund and get you every tax credit and deduction you're entitled to. So before you come in for your appointment, make sure you have all the receipts and income records we will need to help minimize your taxes.

Here's a time saving checklist

Slips

- All T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5)
- Tuition / education receipts (T2202A)
- Universal Child Care Benefit (RC62)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- All other information slips

Receipts

- RRSP contribution slip
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons)
- Medical expenses
- Transit pass receipts
- Charitable donations
- Political contributions
- Child care expenses
- Adoption expenses
- Children's arts and sports programs
- Moving expenses
- Interest paid on student loans
- Carrying charges and interest expenses
- Office - in-home expenses

- Exams for professional certification

Other documentation

- Notice of Assessment/Reassessment
- Canada Revenue Agency correspondence
- Sale or deemed sale of stocks, bonds or real estate
- Northern residents deductions
- Rental income and expense records
- Business, farm or fishing income/expenses
- Automobile / Travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification
- _____



It's Your Time

131 - 12 Street New Westminster, BC V3M 4G9 P - 778-237-8520 W - www.ItsYourTime.ca