What to Bring

#1 All Income Slips

There are many potential income sources. For several of these, you will receive an official government form which you can bring to us to report your income. Some examples are listed below. If you have made income in the tax year that is not reported on an income slip, let us know how much you made and from which income source you received it.

- ❒ Bursary/Scholarship (T4A)
- ❒ Canada Pension Plan (T4A[P])
- ❒ Capital gains from property or investments
- ❒ CERB & CRB repayments (T4A)
- ❒ Commissions from Self-Employment (T4A)
- ❒ Employment (T4)
- ❒ Employment Insurance (T4E)
- ❒ Interest & Investment Income (T5)
- ❒ Old Age Security (T4A[OAS])
- ❒ Partnership income (T5013)
- ❒ Pensions, Retirement & Annuities (T4A)
- ❒ Profit Sharing (T4PS)
- ❒ Rental Income*
- ❒ Registered Education Savings Plan (T4A)
- ❒ Registered Retirement Income Fund (T4RIF)
- ❒ Registered Retirement Savings Plan (T4RSP)
- ❒ Self-Employment or Farming*
- ❒ Social Assistance payments (T5007)
- ❒ Support Received
- ❒ Taxable Benefits (T4A)
- ❒ Tips
- ❒ Trust Allocations (T3)
- ❒ Worker's Compensation Benefits (T5007)
- ❒ Working IT Benefit Advance Payment (RC 210)

*If you don't have a prepared income statement to bring in, ask for one of our handy worksheets
(worksheets are also available at www.taxteam.ca)

#2 All Credit Slips & Receipts

There are also many potential deductions. Some of the deductions, including those listed here, may not apply to you, but it's always best to be prepared!

- ❒ Accounting Receipts & Investment Mgmt Fees
- ❒ Board and Lodging Expenses (TL2)
- ❒ Charitable & Political Contribution Receipts
- ❒ Child Fitness or Arts Receipts (SK only)
- ❒ Childcare Receipts
- ❒ Clergy Residence Deduction (T1223)
- ❒ Dues, not included on a T4
- ❒ Employment Expenses** & completed Conditions of Employment form (T2200 or T2200S)
- ❒ First Time Home Buyer Documentation
- ❒ Home Buyers Plan Repayment
- ❒ Instalment Payments
- ❒ Lifelong Learning Plan Repayment
- ❒ Medical & Dental Premiums (including those paid through payroll deductions)
- ❒ Medical Travel Log**
- ❒ Medical Expenses (all amounts not reimbursed by a medical plan; ask your Pharmacist for a detailed print-out if you have many drug receipts to claim)
- ❒ Moving expenses (T1-M)
- ❒ Northern Resident's Deduction (T2222)
- ❒ RRSP Contribution Receipts
- ❒ School supply receipts (for TEACHERS ONLY)
- ❒ SK Mineral Exploration Tax Credit (SK-METC)
- ❒ SK Pension Plan Receipts
- ❒ Student Loan Interest
- ❒ Support Paid
- ❒ Tuition Slips (T2202, T2202A, etc.)
- ❒ Tuition Rebate Eligibility Certificate
- ❒ Tuition Transfer
- ❒ Venture Capital Credit (T5006)

**Ask for our handy worksheet (worksheets are also available at www.taxteam.ca).

#3 Relevant Correspondence, Documents & Information

- ❒ ***Notice of Assessment* from previous tax year** (The letter CRA sends after you file your tax return.)
- ❒ Any letters or *Notice of Re-Assessment* from CRA
- ❒ We will need the name, address, SIN, and birth date of your spouse or dependent children; if we are not filing a return for them at the same time, we will also need their net income.
- ❒ Significant dates (change in marital status, dates moved to or from Canada, bankruptcy, or death)
- ❒ Legal documents related to custody, Power of Attorney, etc.
- ❒ In the case of a deceased taxpayer, please bring in a copy of the death certificate and a copy of the Will.
- ❒ New clients should bring a copy of the most recent tax return filed with CRA.

These lists are not meant to be exhaustive – bring your questions, too!