

## Personal Tax Checklist

Please provide us with any of the following items as they apply to your situation for the tax year that you would like us to file for you:

- Your legal name, date of birth, address, and phone number
- Your spouse or common-law partner's name, date of birth, and SIN number
  - If we are not filing your spouse's tax return, we will need to know their income for the year being filed.
- Legal names and dates of birth of all dependants (under 18 years of age)
- Child custody documents (child support or parenting orders, custody documents, if applicable)
- All income slips from all sources (T3, T4, T5, T4E, T4A, T4AP, T4RSP, T4RIF)
- Tuition & Education tax receipts (T2202A issued by your school, usually accessible online)
- Interest paid on student loans
- Childcare (nanny, daycare, lunch supervision, child tax credit information)
  - Child fitness or arts (can be claimed in years up to 2016)
- Charitable/Political donation receipts
- Medical receipts (prescriptions, chiropractic, natural healing {must be recognized by CRA}, dental, etc.) for the family if these have not been claimed by your spouse.
- Investment receipts (share purchase and sale information along with statement)
- RRSP contribution receipts
- Old Age Security and CPP benefits and other pensions and annuities
- Employment Insurance benefits, Workers' Compensation benefits, or Social Assistance payments (if applicable)
- Annual union or professional dues or similar
- Public Transit passes (can only be claimed in years up to 2016)
- Spousal support payment information
- Rental property information (if applicable – Checklist available)
- Moving expenses (if applicable – you must have moved at least 40 km from your previous address – Checklist available)
- Declaration of Conditions of Employment (T2200) and receipts for employment expenses you have not been reimbursed for.
  - Expenses can be claimed if you were reimbursed for these by your employer and they were included on your T4 slip.
- Any tax-related correspondence from the government for the current year.