



PRE-TAX CHECKLIST

Before your tax appointment, make sure you have all your slips and receipts. Here are the most common documents required by your ProAdvisor:

SLIPS

- T4 Slips (Employment Income)
- Interest, Dividends, mutual funds (T3, T5, T5008)
- Employment Insurance Benefits (T4E)
- Other Pensions and Annuities (T4A)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Workers' Compensation Benefits (T5007)
- All Other Information Slips

RECEIPTS

- RRSP Contribution Receipts
- Tuition/Education Receipts (T2202A)
- Support for a Child, Spouse or Common-law Partner
- Professional or union dues
- Tool Expenses
(Tradespersons & Apprentice Mechanics)
- Other Employment Expenses
- Medical Expenses - Contact your Pharmacy for an annual statement for multiple receipts
- Charitable Donations
- Political Contributions
- Child Care Expenses
- Moving Expenses
- Interest Paid on Student Loans
- Carrying Charges and Interest Expenses
- Office-in-home expenses

OTHER DOCUMENTATION

- Canada Revenue Agency Correspondence
- Sale of Principal Residence
- Sale or Deemed Sale of Stocks, Bonds or Real Estate
- Rental Income and expense receipts
- Business, Farm or Fishing Income/Expenses
- Automobile/Travel Logbook and Expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters Certification
- Search and Rescue Volunteers Certification