

## PERSONAL TAX CHECKLIST

We want to maximize your refund and help you get every tax credit and deduction you're entitled to.  
We've compiled this checklist of what you'll need to bring to your tax appointment!

### 1 ALL INFORMATION SLIPS

Please provide all your T4s and income slips to avoid a 20% penalty from CRA. If you receive a slip after filing, bring it to us and we will adjust your tax return.

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| <input type="checkbox"/> T4 (employment income)<br><input type="checkbox"/> T4RIF (RRIF withdrawal)<br><input type="checkbox"/> T4RSP (RRSP withdrawal)<br><input type="checkbox"/> T4PS (profit share)<br><input type="checkbox"/> T4A (miscellaneous, CERB)<br><input type="checkbox"/> T4E (EI benefits) | <input type="checkbox"/> T2202 (tuition fees) for you or a dependent ( <i>if you don't have a paper copy, bring your university log-in and we can print for you</i> )<br><input type="checkbox"/> T3 (investment income)<br><input type="checkbox"/> T5 (investment income) | <input type="checkbox"/> T5018 (sub-contractors)<br><input type="checkbox"/> T4A(OAS) (Old Age Security)<br><input type="checkbox"/> T4A(P) (Canada Pension Plan)<br><input type="checkbox"/> T5007 (WCB / AB Seniors Benefit)<br><input type="checkbox"/> all corresponding provincial slips<br><input type="checkbox"/> any other slips you've received |
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### 2 DETAILS OF OTHER INCOME

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| <input type="checkbox"/> Employment income that is not on T4 slips<br><input type="checkbox"/> Business income*<br><input type="checkbox"/> Farming income*<br><input type="checkbox"/> Partnership income | <input type="checkbox"/> Investment income reports (Wealth Simple, Q Trade, stocks, bitcoin)<br><input type="checkbox"/> Rental income, including all amounts received from the sharing economy (AirBnB, Uber, etc) | <input type="checkbox"/> Internet business activities and web address<br><input type="checkbox"/> Interest income that is not on T5 slips<br><input type="checkbox"/> Tips earned<br><input type="checkbox"/> Co-op equity statement (equity statement and T4A) |
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*\*Did you know? We have farm and business record books available at our office! You can use one of these books to track your revenue and expenses throughout the year, then bring it with you to your tax appointment for an easy filing process!*

### 3 DETAILS OF OTHER EXPENSES

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| <input type="checkbox"/> Employment related expenses. You <b>must</b> bring form T2200 provided and signed by your employer.<br><input type="checkbox"/> Tools acquired by apprentice mechanics or other tradespeople<br><input type="checkbox"/> Interest on money borrowed to purchase investments or earn income (RRSP loans don't qualify)<br><input type="checkbox"/> Moving expenses (if you moved more than 40kms closer to work and had or will have income after the move)<br><input type="checkbox"/> Union or professional dues paid that are not on your T4 slip<br><input type="checkbox"/> Interest on student loans (only provincial/federal student loans qualify)<br><input type="checkbox"/> Child care expenses paid, <b>only if incurred when you went to work</b><br><input type="checkbox"/> Adoption related expenses<br><input type="checkbox"/> Clergy residence deduction information (provide a signed form T1223) | <input type="checkbox"/> Disability supports expenses<br><input type="checkbox"/> Home Accessibility Tax Credit. Covers certain renovation costs to improve mobility/reduce risk if you are over 65 years old or claim the Disability Tax Credit.<br><input type="checkbox"/> Educator School Supply Tax Credit for <b>licensed</b> teachers. Provide receipts for eligible school/classroom supplies (up to \$1000) and a letter from your employer confirming the supplies were for use in the classroom.<br><input type="checkbox"/> Home office expenses. You may be eligible to claim home office expenses if you worked from home <b>50% or more of the time over a consecutive 4 week period</b> .<br><input type="checkbox"/> First time home buyers' tax credit. If you purchased your first home, provide legal/lawyer documentation of the purchase.* |
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*\*If you paid GST on your home purchase or build, you may be eligible to receive some of your GST back. Please contact us and ask about the New Housing GST Rebate.*

### 4 OTHER INFORMATION

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| <input type="checkbox"/> Northern Residence and Travel proof ( <b>must</b> be brought in at the time of your appointment). You can claim travel expenses of up to the amount in Box 32 of your T4, or a standard \$1200 per eligible family member under 18.<br><input type="checkbox"/> Provide utility bills, rent receipts, or property tax bills ( <b>required even if only claiming travel</b> ). If you are using utility bills or rent receipts, provide one from January and one from December.<br><input type="checkbox"/> For travel claims, also provide receipts for fuel, hotels, campground or parking fees, meals, etc. Credit card or bank statements are acceptable <b>if they show the city of purchase</b> .<br><input type="checkbox"/> Children in the household claiming a portion of the northern residence or travel need a letter signed by a parent (letter can be picked up at our office <b>prior</b> to appointment) and a copy of utility bills, rent receipts, or property tax bill in the parents' names.<br><input type="checkbox"/> Medical expenses<br><input type="checkbox"/> Provide all receipts for prescriptions, glasses, eye exams, dental expenses, ambulance, Blue Cross or similar plan premiums, etc. For a complete list click here.<br><input type="checkbox"/> If travel was required due to the service not being available locally, provide trip receipts and a signed doctor's letter (can be picked up at our office) that states you were required to travel. If you required someone to travel with you, the doctor's letter also needs to state this.<br><input type="checkbox"/> RRSP investment purchase receipts. If you contribute monthly, bring the current year Jan/Feb receipts as well (may only be received in March). If last year's Jan/Feb contributions were not claimed on last year's return, bring them now. | <input type="checkbox"/> Sale of your home. Provide the year you bought it, the selling price and the legal address.<br><input type="checkbox"/> Foreign property owned that is valued over \$100,000 CAD. Provide details of cash, stocks, trusts, real estate, etc.<br><input type="checkbox"/> Disability Tax Credit. If you or a family member qualify, provide form T2201 signed by a doctor (blank forms can be picked up at our office). Note that it can take a long time to be approved and you can only claim the credit after approval. <i>Eligible diseases/conditions include diabetes, cystic fibrosis, kidney dialysis, down syndrome, blindness, confinement to wheelchair, mental disabilities, etc.</i><br><input type="checkbox"/> Charity donation/contribution receipts (must be a registered charity). Even small donations can have a significant benefit. Donations made personally may have a larger benefit than those made by your corporation. US charities do not qualify unless you have US income.<br><input type="checkbox"/> Political donation / contribution receipts.<br><input type="checkbox"/> Volunteer Firefighter Tax Credit. If you are a volunteer firefighter and have more than 200 volunteer hours in the year, provide a letter from your fire department.<br><input type="checkbox"/> Bank account number and info, if you want to sign up for direct deposit, or if your banking information has changed<br><input type="checkbox"/> Previous year NOA and any other CRA letters - not required but helpful to ensure correct assessment of your return<br><input type="checkbox"/> Spouse or common-law partner's return, if we are not preparing their return, for the purpose of tax planning and review. |
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This list covers most of the information you need to provide, but please bring anything not listed here if you believe you need to report it on your tax return - we'd be happy to go over it with you.

*For more details on any of these items, visit CRA's website.*

**ONCE YOU HAVE ALL YOUR SLIPS AND INFORMATION, PLEASE CALL US AT (780) 928 3277 TO BOOK AN APPOINTMENT. WE LOOK FORWARD TO SEEING YOU!**