

**INDIVIDUAL INCOME TAX  
RETURN CHECKLIST**

- VERY IMPORTANT**  
**EACH FAMILY MEMBER HAVING THEIR TAXES DONE MUST COMPLETE PARTS A & B IN FULL & SIGN THE AUTHORIZATION TO EFILE & TERMS & CONDITION AT PART C (FOLLOW THE INSTRUCTIONS!)**
  
- Employment Slips - T4
- T4A (Pensions, OSAP, Grants, Bursaries, Scholarships and RESP withdrawals)
- Old Age Security - T4A(OAS)
- Canada Pension Plan Benefits – T4A(P)
- Employment Insurance Slips - T4E
- Registered Retirement Income Fund – T4RIF
- RRSP that you Cashed in last year - [T4RSE](#)
- Social Assistance Payments/WSIB – T5007
- Interest, Dividends or Canada Saving Bonds -T5
- Trust Income T3
- T5008 (profit from trading of shares)
- Distribution from a [RCA](#) – T4(A)RCA
- Statement of Employee Profit Sharing Plan – T4PS
- T2202A – Receipt for Tuition (**A MUST FOR STUDENTS**)
- Receipts for courses taken through a Canadian institution providing occupational skills courses and certified by the minister of employment and social development. **YOU are responsible for verifying that your course(s) qualifies.**
- Donation Receipts
- Medical Expenses (Medical Expenses must be submitted as requested as per Medical Information Sheet (see our website) or a \$30 charge will apply)
- RRSP Receipts (if you have automatic monthly contributions, make sure you provide me with the amount you contributed in Jan-Feb of this year (along with March-Dec of last year) – even if you do not have the physical receipt yet.)
- Property Tax Receipt (you cannot claim Water Taxes)
- Rent Receipts (1 receipt from landlord for the year please)
- [Child Care](#) Receipts – Daycare or from an individual (individuals must provide their SIN) – 1 receipt for the year please – not multiple individual receipts.
- Memberships (such as Physicians, Nurses, Engineers, Teachers, ECEs, CYW, PSW etc.)
- Union Dues Receipts
- Interest on Student Loans (only National Student Loan receipts can be claimed – not Student Lines of Credit)
- ONTARIO STAYCATION CREDIT WAS ONLY FOR 2022 (please do not send hotel or camping receipts)
- Children's fitness & art receipts eliminated in 2019 – please stop sending [them](#)
- Working at home due to COVID has been eliminated – you can only claim Home Expenses if you are mandated to work at home and provide us with a T2200 from your Employer stating that you HAD TO WORK AT HOME AS PART OF YOUR CONTRACT.

PLEASE **DO NOT** SEND NOTICES OF ASSESSMENTS, CCB, GST OR TRILLIUM STATEMENTS OR SEND PREVIOUS YEAR TAX PACKAGES WITH YOUR DOCUMENTS - I already have access to this information