

**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 - T4RSP
- 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.** If you do not include the proof that it qualifies, it will not be included in your tax return.
- Donation Receipts
- Medical Expenses (Medical Expenses must be submitted as requested as per Medical Information Sheet (see our website or our email) 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) not individual receipts
- 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
- **Work From 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