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## **Personal Tax Documents Checklist**

The List Below Will Help You Maximize Your Refund and Report All Your Income

<b>T – Slips (Income)</b>		<b>Deductions / Write Offs</b>
	T3 – Investment Income Slips	<a href="#">T2200</a> – Required for Employment Expenses
	T4 – Employment Income Slips	<a href="#">Employment</a> Expenses / <a href="#">Summary</a>
	T4A – Other Income Amounts	Tool Expenses (Tradespersons)
	T4A(OAS) / T4A(P) – Government Pension Slips	ITA Transcript (Apprentices)
	T4E – Employment Insurance (EI) Benefits	Professional / Union Due Receipts
	T5 – Investment Income Slips	RRSP Contribution Receipts - March of Last Year to February of This Year
	T5007 – Social Assistance (WCB) Benefits	Child Care / Adoption Expenses
	T5013 – Investment Income Slips	Charitable / Political Donations
	T5018 – Subcontractor Income Slips	Moving Expenses
		T2202A – Tuition Tax Form (Signed)
<b>Other Income</b>		TL11A – Foreign Tuition Tax Form Completed
	<a href="#">Rental</a> Income / Expenses / <a href="#">Summary</a>	Interest Paid on Student Loans
	<a href="#">Business</a> Income / Expenses / <a href="#">Summary</a>	Exam Costs for Professional Certifications
	Gain / Loss / Sale of Investment Documents	School Teacher Expenses
	Original Purchase & Sale Statement of Adjustments for Sale of Real Estate	Northern Residence Deductions (Location / Days Spent / Trip Details / Cost)
	Spousal Support Income Received (Totalled)	Spousal Support Payments Made (Totalled)
		Interest / Broker Costs for Investments
<b>Other Items</b>		Medical Expenses or <a href="#">Summary</a>
	Tips Received / Estimated (Taxi Driver / Waiter)	Seniors (Over 65) Home Renovation Costs (Undertaken for Mobility Reasons)
	Separation / Divorce Agreement	
	Prior Year Income Tax Return	

### **What we don't need:**

- MSP statements or summaries
- GST/HST Credit statements
- Statements of investment activities for your RRSPs, TFSA, RRIFs, or RESPs
- School activity or busing fees for your children
- Fitness / art activity costs for your children (unless they are considered Child Care)
- Tuition fee invoices or cost breakdowns (only deductible from T2202A Tax Form)

Did you know there are over 400 different deductions and credits in the Canadian tax system? If you are wondering if something can be deducted, please included with your tax documents and we'll check.

\* Helping our clients thrive through excellent accounting, tax, and mentorship solutions. \*