



Tax Receipt Checklist

Potential Slips & Receipts

_____ *Instalment Payments Summary*

_____ *Dependent Information (Full Name & Birthdates)*

_____ *T4 (Employment Income)*

_____ *T4A*

_____ *T4A (OAS) (Old Age Security Pension)*

_____ *T4A (P) (Canada Pension Plan)*

_____ *T4RIF (Registered Retirement Income Fund)*

_____ *T4E (Employment Insurance Benefit)*

_____ *T3 (Trust Income)*

_____ *T5 (Investment Income)*

_____ *T5007 Statement of Benefits*

_____ *T5008 Statement of Securities*

_____ *T2202 Tuition Receipt (Print this off of the institutions website with student log in)*

_____ *T2200 or T2200S (Declaration of Conditions of Employment)*

_____ *Supporting documents (expenses receipts, mileage log, etc.) to support claim*

_____ *T4RSP (RRSP Income)*

_____ *Taxable Capital Gains Summary (found on your Dec 31st Statement of Investments)*

_____ *Rental Income Summary & Associated Expenses*

_____ *Small Business/Self Employment Income & Associated Expenses*

_____ *RRSP Deduction (Provide RRSP Contribution Receipts – 2024 & first 60 days of 2025)*

_____ *Charitable Donations*

_____ *Medical Expenses (You can request a prescription summary from your pharmacist)*

_____ *Statement of Student Loan Interest*

_____ *Moving Expenses (moved more than 40 km for employment or to attend post-secondary schooling)*

_____ *Professional Association / Union Due Statements*

_____ *Childcare Receipts*

_____ *Home Buyers Plan Information*

_____ *Direct Deposit Information (if update or change is required)*