



Tax Receipt Checklist

_____ Notice of Assessment and/or Notice of Re-Assessment from Previous Year (if applicable)
_____ Instalment Payments Summary
_____ Dependent Information (Full Name & Birthdates)

Potential Slips & Receipts

_____ 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 – 2020 & first 60 days of 2022)
_____ 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)