



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 – 2023 & first 60 days of 2024)*
- _____ *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)*