



### Tax Receipt Checklist

- \_\_\_\_\_ *Notice of Assessment from Previous Year*
- \_\_\_\_\_ *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 (Declaration of Conditions of Employment)*
- \_\_\_\_\_ *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 – 2016 & first 60 days of 2017)*
- \_\_\_\_\_ *Charitable Donations*
- \_\_\_\_\_ *Medical Expenses (You can request a prescription summary from your pharmacist)*
- \_\_\_\_\_ *Statement of Student Loan Interest*
- \_\_\_\_\_ *Receipt or Statement any union or professional association dues*
- \_\_\_\_\_ *Moving Expenses (moved more than 40 km for employment or to attend post-secondary schooling)*
- \_\_\_\_\_ *Professional Association / Union Due Statements*
- \_\_\_\_\_ *Childcare Receipts*