

***This following checklist is generic so all the slips or information listed may or may not be required. This checklist is a guide to assist you in remembering what may apply to your situation.***

- T4 Slips                      Ensure you receive a T4 from EVERY place worked in the current tax year.
- T4AP & T4AOAS            Canada Pension & Old Age Security
- T5 Slips                      Financial institutions where you are paid interest
- T3 Slips                      Investments companies where you may have mutual funds
- Investments                Full package from your financial advisor for all your investments
- Investments                Contact your financial advisor for a realized gains/losses report and all T3's and T5's as well as supplementary information, if a full investment package is not available.
- Advisor fees                Contact your financial advisor for fees paid for your NON-registered investments if a full investment package is not available.
- Tuition receipts            T2202's for you, your spouse and/or your dependant children who will be transferring their tuition credits to you
- Childcare                    ***Complete the CHILDCARE worksheet from the FORMS section on our website***
- Donation                    ***Complete the DONATION worksheet from the FORMS section on our website***
- Medical/Dental            ***Complete the Medical worksheet from the FORMS section on our website***
  - Don't forget Travel Medical costs and Residential Care Fees.
- Rental Income              ***Complete the Rental worksheet from the FORMS section on our website***
- Small Business            ***Complete the Business worksheet from the FORMS section on our website***
- Vehicle for work            ***Complete the Vehicle ONLY worksheet from the FORMS section on our website***
- Work from Home            ***Complete the Work from Home worksheet from the FORMS section on our website***
- T2200                        Supplied by employer and is required to claim employment expenses (vehicle use, work from home, supplies, etc)
- Moving                      ***Complete the Moving worksheet from the FORMS section on our website***
- Renters                      ***Complete the BC Renter worksheet from the FORMS section on our website***