

Before you visit APlus Income Tax Services, use this handy checklist to ensure you have all the documents your tax professional needs to help maximize your refund.

TAX SLIPS

- T4 – Employment income
- T4E – Employment Insurance income
- T4RSP – Registered Retirement Savings Plan (RRSP) income
- T4RIF – Registered Retirement Income Fund income
- T4A – OAS, T4AP – Old Age Security & CPP Benefits
- T3, T5, T5008 – Interest, dividends, mutual funds
- T2202A – Tuition / education receipts
- T5007 – Workers' compensation/social assistance benefit D All other information slips

RECEIPTS

- RRSP contributions
- Support for Child, Spouse or Common Law Partner
- Professional or union dues
- Tool expenses (tradesperson, apprentice & mechanics)
- Teacher's School Supplies
- Medical expenses
- Transit passes receipts
- Political donations
- Child care expenses
- Adoption expenses
- Moving Expenses
- Student loan interest
- Carrying charges and Interest expenses
- Office – in – home expenses
- Professional Certification exams expenses
- Home Renovations (Seniors and Disabled)
- Charitable Donations

OTHER DOCUMENTS REQUIRED

- Notice of Assessment/Reassessments / CRA Correspondence
- Mortgage Statement Current Year
- Sale of Principle Residence
- Sale or Deemed sale of stocks, bonds or real estate
- Northern resident's deduction
- Rental Income & Expense Records
- Business, farm or fishing income/expenses
- Automobile /travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification
- Search and Rescue volunteer's certification
- Written certification for eligible educator school supplies
- AUT 01 (Authorize Rep)
- Confirmation of work from home Tax Credit eligibility

**** This checklist is not intended to be a complete list of all the possible documentation that you may need. Individuals should seek the advice of a professional in order to ensure they have the information and documentation appropriate to their specific situation**

If you have any questions or concerns and would like to make an appointment to talk to our financial advisor, please contact forms@aplusas.ca or call 709-747-7711