



### **TAX APPOINTMENT PREPARATION**

Please have all slips & receipts with you and/or available for your appointment  
All slips & receipts must be included with your drop-off. All paperwork will be returned.

#### **Income Slips**

T4       T4A       T4E       T5007       Spousal Support Received

#### **Pension Income Slips**

T4A                       T4A(P)   
T4A(OAS)               T4A-RCA   
T4RSP                   T4RIF                   Foreign Pension

#### **Investment Income**

T3                       T5                       T4PS                       T5013   
T5008                   Foreign Investment                   Stock Options

#### **Deductions for Investments**

Interest for Investment Income                       Management Fees   
Accounting/Legal Fees                       Eligible Retiring Allowance

#### **CRA Repayment or Considerations**

HBP- Home Buyers' Plan                       LLP- Lifelong Learning Plan   
Capital Gains                       Personal Residence/Cottage



**General Deductions for credits (receipts required)**

- |   |   |
|---|---|
| RRSP/PRPP <input type="checkbox"/>                    | Child Care Exp <input type="checkbox"/>                       |
| Moving Exp <input type="checkbox"/>                   | Spousal Support Made <input type="checkbox"/>                 |
| Employment Exp <input type="checkbox"/>               | Signed T2200 <input type="checkbox"/>                         |
| Medical Exp <input type="checkbox"/>                  | Charitable Donations <input type="checkbox"/>                 |
| Rent paid <input type="checkbox"/>                    | Political Contributions <input type="checkbox"/>              |
| Tuition <input type="checkbox"/>                      | T2200 <input type="checkbox"/>                                |
| Eligible Teaching Supplies <input type="checkbox"/>   | Disability Certificate <input type="checkbox"/>               |
| Travel for Medical <input type="checkbox"/>           | Home Accessibility for Disability <input type="checkbox"/>    |
| First-time Home Buyer <input type="checkbox"/>        | Medical Exp for Caregiver Dependants <input type="checkbox"/> |
| Union Dues/Professional Fees <input type="checkbox"/> | Property Taxes <input type="checkbox"/>                       |
| Northern Resident <input type="checkbox"/>            | Union Dues/Professional Fees <input type="checkbox"/>         |
| Volunteer Firefighter <input type="checkbox"/>        | Search and Rescue Volunteer <input type="checkbox"/>          |
| Digital Subscriptions <input type="checkbox"/>        |   |

**Self-Employed or Sole Proprietor Income/Expenses**

- |   |   |
|---|---|
| Gross Sales <input type="checkbox"/>          | Statement of Rental Income <input type="checkbox"/> |
| Home Office Expense <input type="checkbox"/>  | Business Expense <input type="checkbox"/>           |
| Vehicle Mileage Log <input type="checkbox"/>  | Vehicle Expense <input type="checkbox"/>            |
| Inventory Cost <input type="checkbox"/>       | Cost of Borrowing <input type="checkbox"/>          |
| CRA Tax Installments <input type="checkbox"/> | Capital Purchase or Sale <input type="checkbox"/>   |