

## Things to bring with you when you have your tax return prepared!

This is a CHECKLIST of the most common items you should bring with you when having your tax return prepared. This list is not meant to be complete in every respect and some items may not apply to every person. However, bring with you all information that is relevant. Doing so will avoid delays and reduce the time necessary to complete your return.

---

### Information sent to you by the Canada Revenue Agency (CRA)

- Notice of Assessment:* The blue statement sent to you after you filed your tax return last year
- Filing Labels:* The sheet sent to you this year that includes your address, SIN and access code
- Previous Years Return:* For new clients this will be the Tax Summary given to you last year

### Personal Information

Contact Name & Address: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Social Insurance Number: \_\_\_\_\_

Marital Status:  Married  Single  Divorced  Common Law  Separated  Widower

Do you want your name and address sent to Elections Canada?  YES or  NO

Do you own foreign property in excess of \$100,000?  YES or  NO

Are you disabled and have a disability certificate provided by CRA?  YES or  NO

### Income Slips

- Earned Income:* T4, T4(PS), T4A, etc.
- EI Benefits:* T4E
- Pension Income:* T4A(P), T4A(OAS)
- Foreign Pensions:* Statements or receipts showing amount received and currency
- Investment Income:* T3, T5 including account interest and Canada Savings Bonds
- Self Employed Income:* Summary of revenue and expenses
- Other Income:* Child support & alimony

### Expenses

- Medical:* Drug prescriptions, glasses, dental, Travel Insurance, etc.
- Union Dues:* Generally included on T4 slip
- Safety Deposit Box:* Amounts
- Charitable & Political Donations:* Receipts
- Education:* Tuition and education receipts, generally described on T2202A
- RRSP Contributions:* Receipts from you financial institution
- Childcare:* Receipts

### Tax Credits

- Apartment Rent:* Receipts
- Nursing Home Fees:* Receipts
- Home Owner:* Property Tax Statement