*We have prepared this checklist to help you assemble your financial information for preparation of your income tax return. To be of full use, the checklist should be completed and returned to us together with the financial information assembled.*

**( √ ) IF APPLICABLE TO YOU PROVIDE**

* + Last Year’s Notice of Assessment Bring a copy (ALL PAGES)
  + Any Notice of Assessment received from

CRA during the year Bring a copy (ALL PAGES)

***INCOME***

* Regular earnings All T4's or pay slips
* Odd jobs, tips Pay slips, details
* Scholarships, bursaries and study grants T4A; *OSAP usually mails this form to you*
* RESP WithdrawalsT4A; *from investment company for taxable portion of money received*
* Other Details

***INVESTMENT INCOME***

* Interest - savings account T5 slips or pass books
* Term deposits or G.I.C.'s T5 slips or details
* Mutual fund investment income T3 slips or statements
* Dividends - Canadian corporations T5 slips
* Interest - Canada Savings Bonds T5, T600 or T600C slips (Details if no slips - for accrual)

***DEDUCTIONS AND CREDITS***

* Tuition fees over $100 paid (post-secondary) Form T2202 or T2202A

*This can be accessed online on your student portal.*

* Interest on student loans Receipts

*Amounts paid in the current year or paid in the*

*past five years which have not been claimed*

* RRSP contributions Official Receipts
* Donations to registered charities Official tax receipts
* Unused prior year donations Full details
* Rent paid Receipts from landlord for amounts paid.

*Please provide name of Landlord, address of*

*rental property and the number of months rented.*

* Public transit passes Receipts
* Medical Expenses Receipts, summaries, etc

*for any 12 month period ended in the tax year,*

*including private insurance (ie. Blue Cross, travel*

*health ins.) and premiums*