

# Personal Tax Checklist

We want to make sure we maximize your refund and get you every tax credit and deduction you're entitled to.

So before you visit Waterford Tax & Advisory Inc., make sure you have all the receipts and income records our tax consultant will need to help minimize your taxes.

## Personal Tax Return

### Slips

- All T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5)
- Tuition / education receipts (T2202A)
- Universal Child Care Benefit (RC62)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- All other information slips

### Receipts

- RRSP contribution slip
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons)
- Medical expenses
- Transit pass receipts
- Charitable donations
- Political contributions
- Child care expenses
- Adoption expenses
- Children's arts and sports programs
- Moving expenses

### Receipts (continued)

- Interest paid on student loans
- Carrying charges and interest expenses
- Office - in-home expenses
- Exams for professional certification

### Other documentation

- Notice of Assessment/Reassessment
- Previous year tax return
- Canada Revenue Agency correspondence
- Sale or deemed sale of stocks, bonds or real estate
- Northern residents deductions
- Rental income and 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
- Property taxes paid
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