

## Personal Tax Checklist

**Copy of previous year tax return**

**Signed CRA authorization form (see admin)**

**Signed engagement letter**

**Previous year Notice of Assessment**

**Donations (must indicate Charity registration #) no Charity Lottery tickets (ie. Princess Margaret Lottery)**

**RRSP Contributions – slips provided by your financial institution**

**Political Contributions**

**FINAL Property Tax Statement – not Interim**

**Childcare expense(s) – must indicate the child's name**

**Employment Expenses – Completed Declaration of Conditions Employment T2200 form and signed by employer**

**Dispositions of capital property – any sale of investments, real estate etc. will need the details of the sale**

**Dispositions of Principal Residence - proceeds on sale, confirmation of original purchase price and the date of purchase**

**Medical Receipts – For medical prescriptions please provide summary for the year from Pharmacy.**

**T4, T4A, T4U, T4A(P), T4(OAS), T4E, T5, T3, T5013 and all other Canadian tax slips**

**T2202A – Tuition Form (student needs to sign 2<sup>nd</sup> page if transferring credits to parent)**

**Rent Receipt – Full address, name of landlord and duration of time rented**