



To ensure the greatest tax savings, we have provided a checklist for you of what to bring.
This list is applicable to most taxpayers. There may be other items missing that may apply to you.

- Personal Information Sheet
- All tax slips (t4, t5, t3, investment slips, etc.)
- RRSP, Pension, RIF, Canada Pension, Old Age Security, or foreign pension slips
- Donation receipts
- Investment Interest Paid or Investment Management Expenses. (Carrying Charges)
- Capital Gains Information on sale of property or investments.
- If you sold your principal residence last year, we need date purchased, amount sold for and was the property ever used for business or rental
- Property tax bill or rent receipts for principal residence.
- Copy of disability tax credit certificate if a new claim or renewing expired claim
- Copy of your previous tax return if you had a business or rental property.
- List of any foreign investments or assets. This is required by the CRA if they cost more than \$100,000 Canadian funds. This includes monies in a Canadian investment account that is in foreign funds
- Child Care or camp receipts
- Medical Receipts
- Rental Income and Expenses if applicable
- Business Income and Expenses if applicable
- Moving Expenses (New job or Position at new work location over 40km away
- Union Dues Receipts
- RRSP contribution receipts for the period March – December for the current tax year PLUS the first 60 days of the following year
- Clergy Expense Deduction if applicable
- Child or Spousal Support paid or received
- Tuition receipts from the educational website only (T2202 form)
- New first-time home buyer information (property information, date purchased and who claiming)
- Student Loan Interest Paid
- Volunteer Firefighter or Search and Rescue Tax Credit
- Anything else you may think applies to your tax return that may not be on this checklist