

We want to make sure we maximize your refund and get you every tax credit and deduction you're entitled to! Keep all your receipts stored here to simplify tax time.

It is our recommendation you scan and send us copies of medical receipts, professional dues, education receipts, child care and donation receipts as those are the most requested by CRA. This would eliminate the need for us to have to reach back out for further receipts should the CRA request them.

Here's a handy checklist:

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)
- ☐ Declaration of Conditions of Employment (T2200)
- ☐ All other information slips

Receipts

- ☐ RRSP contribution slip
- ☐ Support payments to spouse/common-law partner
- ☐ Professional or union dues
- ☐ Medical expenses
- ☐ Charitable donations
- ☐ Political contributions
- ☐ Child care expenses
- ☐ Moving expenses
- ☐ Interest paid on student loans (OSAP Only)
- ☐ Carrying charges and interest expenses
- ☐ Exam fees for professional certification
- ☐ **Office - in-home expenses ***
- ☐ _____
- ☐ _____
- ☐ _____

* Eligibility

You are eligible to claim a deduction for home office expenses if you work from home, if you meet all of the criteria.

Submit applicable receipts and we will sort them accordingly.

Other documentation

- ☐ Notice of Assessment/Reassessment
- ☐ Canada Revenue Agency correspondence
- ☐ Sale of stocks, bonds or real estate
- ☐ Rental income and expense records
- ☐ Business income/expenses
- ☐ Automobile expenses
- ☐ Disability Tax Credit Certificate
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Office Expenses

- ☐ Utilities
- ☐ Leased equipment
- ☐ Property taxes
- ☐ Mortgage Interest
- ☐ Repairs
- ☐ _____
- ☐ _____
- ☐ _____

Tax Year: _____

Client: _____

