**What to Bring**

**Income Tax Filing**

\_\_\_ Notice of Assessment

\_\_\_\_ All mail from Revenue Canada

**Income: T-Slips**

\_\_\_: T4: Employment Income

\_\_\_: T4A(OAS): Old Age Security, Foreign Pension

\_\_\_: T4A(P): CPP, Survivor, Disability, Child, Benefits

­­\_\_\_: RC62: Universal Child Care Benefit

\_\_\_: T4E: Employment Insurance

\_\_\_: T3, T5: Capital Gain, Interest, Dividends, Mutual Funds

\_\_\_: T4A: Other Pension, Retiring, Annuities, Grants, Scholarship

\_\_\_: T4RSP: RRSP withdrawal

\_\_\_: T5007: Social assistance payments, Workers compensation

**Deductions:**

\_\_\_: RRSP contribution slips

\_\_\_: Professional or union dues

\_\_\_: Child care expenses

\_\_\_: Moving expenses

\_\_\_: Carrying charges and interests paid on Investment Income

\_\_\_: Employment Expense Automobile, Travel Ex. with logbook and T2202

\_\_\_: Clergy residence deduction

**Non-refundable credit**

\_\_\_: Volunteer firefighter, Search and rescue amounts [letter from authorized body]

\_\_\_: Transit passes; \_\_TTC, \_\_GO, \_\_, GTA, \_\_Presto [not tickets]

\_\_\_: Children’s fitness amounts

\_\_\_: Children Arts and Music amounts

\_\_\_: Home buyers amount [House bought document]

\_\_\_: Medical Expenses, Dental, Eye,

\_\_\_: Charitable donations

\_\_\_: Political contributions

**Student**

\_\_\_: T4A: Scholarships, Bursaries, Grants, from Ministry of Training, RESP, University

\_\_\_: T2202A: Tuition, Education Textbook Amounts

[print from university’s or college’s Web under your student number]

\_\_\_: TL11A, B, C: -Student from Foreign University, Flying school, Post-secondary education

\_\_\_: Interest paid on student loans [OSAP program loans only]

**Parents** claiming Children who are age under 18

\_\_\_: First name, Last name & Date of Birth

\_\_\_: RC-62 UCCB

**Caregiver dependent**

\_\_\_: Senior parents age over 65:

First, Last name, Date of Birth, SIN,

Total Income

\_\_\_: The tax filer and their parents’ address must be the same

**Disable Dependent**

\_\_\_: Form T2201 signed & Disability Tax Credit Certificate

**Other document**

\_\_\_: Rent

\_\_\_: Property tax

**Business Rental Income & Gains**

**Rental Income and Related Expenses**

\_\_\_: Rental Income

\_\_\_: Mortgage Interest [statement from bank]

\_\_\_: Property Tax

\_\_\_: House Insurance

\_\_\_: Repair & Maintenance

\_\_\_: Utilities [hydro, gas, water, cable]

\_\_\_: CCA method: Total costs of the property [documents from Lawyer + costs of additions + renovation]

**Capital Gain on Sale of a Property**

\_\_\_: Purchase documents [Lawyer given to you}

\_\_\_: Sales documents [Lawyer given to you]

**Stock Trading**

\_\_\_: Stock Trading Summary

**Business Income and Related Expenses**

\_\_\_: Income, Expenses

\_\_\_: GST/HST returns

**Phone List**

**Service Canada** monitors **“Canada’s Social Security System”**

**Income Security**

For

Old Age Security Pension [OAS] & Guaranteed Income Supplement [GIS]

Canada Pension Plan [CPP]

Disability Pension [CPP D]

And

Employment Insurance

**Call 1-800-277-9914**

**Go online** [**www.cra-arc.gc.ca/myaccount/**](http://www.cra-arc.gc.ca/myaccount/)

**And open “My account” to view or print**

\_\_\_: for Notice of Assessment,

\_\_\_: and related tax matters

**We Will Help You: Please Visit**

Peter Justin Chartered Professional Accountant

Public Business Accounting Services Inc.

11-1415 Kennedy Road, Toronto ON M1P 2L6, Tel: 416-321-3100, Fax: 416-321-8400

Email: PublicAccounting@bellnet.ca