

Documents	<input type="checkbox"/> Prior Year Notice of Assessment	<input type="checkbox"/> Summary of current year installment payments
Income	<p>Personal</p> <input type="checkbox"/> T4 – Employment Income <input type="checkbox"/> Other Employment Benefits (eg. Tips) \$ _____ <input type="checkbox"/> T4A (OAS) – Old Age Security <input type="checkbox"/> T4A (P) – CPP Benefits <input type="checkbox"/> T4A – Other Pension or Superannuation <input type="checkbox"/> T4E – Employment Insurance Benefits <input type="checkbox"/> T5007 – Social Assistance/WCB <input type="checkbox"/> T4 RSP – RRSP Income <input type="checkbox"/> T4 RIF – RRIF Income <input type="checkbox"/> Foreign Pensions – Country _____	<p>Investment</p> <input type="checkbox"/> T3 – Estate/Trust/Mutual Funds Income <input type="checkbox"/> T3/T5 – Interest and Dividend Income <input type="checkbox"/> Annual Statement(s) from Mutual Fund(s) <input type="checkbox"/> T600 – Canada Savings Bonds <input type="checkbox"/> T5008 – Statement of Security Transactions <input type="checkbox"/> T5013 – Limited Partnership Income <input type="checkbox"/> Capital Gains/Losses* <input type="checkbox"/> Trading Summary from Broker(s) <input type="checkbox"/> Interest on Tax Refund(s) <input type="checkbox"/> Foreign Income
	<p>Business</p> <input type="checkbox"/> Self-Employed Income (use Self Employment Income Checklist)	<p>Other</p> <input type="checkbox"/> Alimony Received <input type="checkbox"/> Taxable Child Support <input type="checkbox"/> T4A Scholarships/Bursaries
Deductions	<p>Employment</p> <input type="checkbox"/> RRSP Contribution (Official Receipts) <input type="checkbox"/> Union, Professional Dues <input type="checkbox"/> Employment Insurance Benefit Repayments <input type="checkbox"/> Accounting Fees <input type="checkbox"/> Deductible Legal Fees <input type="checkbox"/> Employment Expenses (use Employment Expense Checklist) <input type="checkbox"/> Moving Expenses*	<p>Investment</p> <input type="checkbox"/> Safety Deposit Box Charges <input type="checkbox"/> Interest and Carrying Charges <input type="checkbox"/> Investment Counsel and Accounting Fees <input type="checkbox"/> Allowable Business Investment Loss
Tax Credits	<p>Other</p> <input type="checkbox"/> Alimony Paid <input type="checkbox"/> Deductible Child Support Paid <input type="checkbox"/> Child Care Expenses*	
	<input type="checkbox"/> Adoption Expenses <input type="checkbox"/> Transit Pass <input type="checkbox"/> T2201 Disability Credit certificate <input type="checkbox"/> CRA eligibility validated? Y N (if YES, provide documentation) <input type="checkbox"/> T2202(A) – Tuition Fees/Education Credit <input type="checkbox"/> T2202(A) – Tuition Fees/Education Credit for Dependant <input type="checkbox"/> Interest Paid on Student Loans <input type="checkbox"/> Medical Receipts – Include Insurance reimbursement statements <input type="checkbox"/> Charitable Donations (Official Receipts) <input type="checkbox"/> Political Contribution (Official Receipts)	<p>*Full Details Required</p>