

**Income items:**

- All information slips
(i.e. T3, T4, T4A, T4A (OAS), T4A (P), T4PS, T4E, T4RSP, T4RIF, T5, T5007, T5008)
- Investment income not reported on slips
(interest, dividends, capital gains)
- Gratuities/tips
- Investments summary
- Partnership statements
- Sale of property including shares, mutual funds, real estate
- Foreign income/pensions/investments
- Spousal support
- Other income/taxable benefits: _____

Tax Credits:

- Medical expenses
 - Medical receipts
 - Medical premiums paid to private health services plans (not paid by employer)
 - Travel for medical services (>40km)
 - Home renovations for disability/accessibility
 - Adoption/fertility expenses
- Education credits
 - Tuition receipts
 - Interest paid on a government student loan
 - Tuition transfer from child/to parent (T2202A signed by student)
- Charitable donations
- Political contributions
- Property taxes or rent paid
- First-time home buyer (statement of adjustments from lawyer)
- Children's arts/fitness receipts
- Emergency services volunteer info
- Eligible supplies as a teacher
- Disability tax credit, Canada/primary caregiver

Deductions:

- | | |
|--|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> RRSP contributions <input type="checkbox"/> Child care expenses or camp fees <input type="checkbox"/> Investment carrying charges/interest <input type="checkbox"/> Investment counsel/management fees <input type="checkbox"/> Spousal or child support <input type="checkbox"/> Moving expenses <input type="checkbox"/> Northern residence deduction | <ul style="list-style-type: none"> <input type="checkbox"/> Employment deductions <ul style="list-style-type: none"> Union/professional dues Clergy residence deduction information Employment expenses (T2200 - signed by employer) Transport company meals and lodging logbook |
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Self Employed/Rental income

- If you own a business, rental, or farm please provide a summary of income and applicable expenses including assets purchased/sold, and business/personal use of home and auto. Forms for download are available online on our website for your convenience. If you have a GST account please include all GST correspondence for the year.
- If you operate a farm and participate in the AgriStability or AgriInvest program please provide details of income and expenses as well details on crop and livestock inventory. Fillable forms are available online to assist you if you prefer.

COVID-19:

- If you received income from one of Canada's COVID-19 benefit programs including CERB, CRB, CRSB, CRCB you will receive a T4A in the mail to claim this benefit.
- If you worked from home more than 50% of the time over a period of at least four consecutive weeks in 2020 due to COVID-19 you are now eligible to claim the home office expense deduction. A new temporary flat rate method allows you to claim a deduction of \$2 per day for each day you worked at home up to \$400. Please indicate the number of days when you submit your information. Alternatively, your employer can complete the T2200S form.
- If you were self-employed in 2020 and took advantage of any of the COVID-19 support programs (CEWS, CERS, CEBA loan, Manitoba bridge grant etc) please provide all documents relating to the program.

**If you have questions about whether or not you qualify, or what documentation is needed,
please call our office or email.**