

**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
- Non-registered 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 (prescription summary from pharmacy if substantial)
  - Medical premiums paid to private health services plans (not paid by employer)
  - Travel for medical services (>40km)
  - Home renovations for disability/accessibility/multigenerational living (secondary suite)
  - Adoption/fertility/surrogacy expenses
- Education credits
  - Tuition receipts
  - Interest paid on a government student loan
  - Tuition transfer from child/to parent (T2202 signed by student)
- Charitable donations
- Political contributions
- Digital news subscription
- Property tax statement or receipt of 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:**

- RRSP contributions
- Childcare expenses or camp fees
- Investment carrying charges/interest
- Investment counsel/management fees
- Spousal or child support
- Moving expenses
- Northern residence deduction
- Employment deductions
  - Union/professional dues
  - Clergy residence deduction information
  - Employment expenses (T2200 - signed by employer)
  - Transport company meals and lodging logbook
  - Construction industry labour mobility expenses

**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. If you have a rental property, please advise your accountant if it is used for short-term rentals (AirBnB or similar). 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 as details on crop and livestock inventory. Fillable forms are available online to assist you if you prefer.

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