



# TOM CORSMEIERS TAX SERVICES

MORE THAN JUST NUMBERS

**Here is a convenient checklist to help ensure you have all the records and receipts needed to complete your tax return**

## Tax Documents

- Notice of Assessment from Canada Revenue Agency
- Other related correspondence from the Canada Revenue Agency
- Copy of your previous years tax return
- Employer pay stub summary

## Federal Slips

- Employment Income T4
- Other Income T4A
- Employment Insurance T4E
- OAS and CPP T4A (OAS) and T4A(P)
- RRSP and RRIF Income T4RSP or T4RIF
- Investment, Interest, Dividend, Trust Income T3, T5
- Workers Compensation/Social Benefits (T5007)

## Receipts

- RRSP Contributions
- Moving Expenses
- Child Care Expenses
- Medical Expenses
- Professional Fees or Union Dues
- Charitable and/or Political Donations
- Child and/or Spousal Support
- Tool Expenses (tradespersons)

## Students

- All T4 Slips from Employment
- Student Tuition and Education T2202/T2202A
- Student Loan Interest Statement

## Investments

- Interest and Dividends – T3, T5 or other
- Redemption Stocks, Bonds, Real Estate – T5008
- Management/Trading Fees and Interest Expenses
- Capital Gains/Losses Records

## Employment

- T2200 Declaration of Conditions of Employment
- Travel Expenses and Mileage Log
- Office Expenses (home or other)

## Rental Business

- Rental Income and related Expenses and Maint Receipts
- Income/Expense Receipts, Bank and Credit Card Statements

## Other

- Sale of Principle Residence in current tax year
- Disability Tax Credit T2201
- Northern Residents