



Personal Tax Return Checklist

Laity Tax has compiled this list of tax slips, receipts, and other documentation to bring with you for your visit.

Income tax Slips

Employers are required to have employment income slips prepared and mailed by February 28, to the address that they have on file. If not received by March 8, check with your employer.

For T3 slips, your financial institution is required to mail them by March 31.

- T4 employment income
- T4E Employment Insurance
- T4A Pensions and annuities
- T5007 Provincial assistance and WCB payments
- T4A(P) Canada Pension Plan
- T4A(OAS) Old Age Security
- T4RSP & T4RIF RRSP and RIF Income
- T3 Trust income
- T5 Investment Income
- T5018 Contract Payments

Other Various Income slips

- T4A-RCA, T4PS, T10, T101, T5008, T5013, RC210, Foreign Income

Receipts

Canada Revenue Agency's (CRA) position is to disallow deductions and credits, unless the taxpayer can prove they had the expense.

- Tuition Slips T2202A (if transferring, ensure page 2 is signed accordingly)
- RRSP contribution slips
- Rent and/or property taxes
- Medical receipts (any provincial college of registered medical practitioners)
- Registered charitable donations
- Political donations
- Interest paid on student loans

- Professional and/or union dues
- Carrying and interest expenses for investments
- Spousal support payments/income received (for payment deduction, a copy of the court order is required)
- Attendant care expenses (for individuals with disabilities)
- Moving expenses (minimum move of 40 km for employment or education)

Children

- Dependent information
- Childcare expenses
- Adoption expenses
- Receipts from sports, music, etc.

Professional

- Office in home (requires T2200 signed by employer)
- Tradesperson tool expense receipts
- Auto expenses, Mileage logbook

Other Information

- Northern Residents Deductions T2222
- Clergy Residence Deduction T1223
- Capital gains/Adjusted cost base (ACB required for disposed stocks)
- Sold principal residence (Information on purchase and sale)
- Rental Property (income and expenses)
- Sale of rental property
- Self-employed (income and expenses including GST/HST information)

What to Expect

When you visit a Laity Tax office, you can rely on real help from real people, products, and tax services, with real benefits. Get the services you need, the refund you want, and the experience you deserve.

Upon arriving at a Laity Tax office, you will be required to sign an authorization form allowing Laity Tax to be your representative at Canada Revenue Agency. We will also ask for two pieces of identification, one must be a photo ID.

You will be asked a series of questions to ensure Laity Tax obtains the highest refund possible for you.

We will then prepare your tax return, provide you with a printed copy, and will ask you to sign form T183, authorizing us to electronically file your return.