

## Personal Income Tax Checklist

A best practice used for Arun's iMax Refund Promise

### SLIPS

#### Income

- Employment T4, T4A
- Unemployment / Maternity T4E
- CPP Pension & OAS T4A(P) , T4A(OAS)
- Employer Retirement Pension
- Universal Child Tax RC62
- Social Assistance T5007
- Dec 31<sup>st</sup> Payslip – Final of the tax year
- T2200 – Condition of Employment

#### Investments

- Savings T5
- Investment T3
- T5008
- Interest paid
- Fund manager Fee
- Trading Summary

#### RRSP

- RRSP Contribution
- RRSP Withdrawal - Cash
- Home Buyer Withdrawal
- LLP Withdrawal

### RECEIPTS

#### Home

- Rent Paid
- Property Tax Paid
- First Time Home Buyer – closing date
- Home Byers Plan Repayment / Reinvest
- Moving Expenses - To start a new job
- Healthy Homes Renovation Tax Credit
- Clergy Residence Deduction

#### Education

- Tuition Fee Paid – Full & Part time T2202A  
- where do I print T2202A from? See page 2 bottom
- Interest Paid On Student Loan (Example: OSAP)
- Tuition Fee Paid Outside Canada TL11A
- LLP Repayment / Reinvest
- Moving Expenses - To study
- Exam Fees – example Pharmacy exam fee

#### Children & Dependents

Unions Fees

- Child Care Expenses
- Children Sports Programs
- Arts Programs
- Private School Fees
- Disability for Children
- Adoption Expenses
- Care Giver For Children, parents, in-laws and grand parents
- Disability For Children, parents, in-laws and grand parents
- Spousal Support

#### General

- Public Transportation (TTC, GO Transit, YRT)
- Donations
- Unions Fees
- Volunteer Firefighters / Rescue Volunteers
- Professional Dues
- Safety Deposit Box Rental
- Political Contributions
- Trade Person Tools Expenses
- Installment payments – Tax paid in advance

# Medical Expenses

- Health Insurance Premium Paid at Work – Dec 31<sup>st</sup> payslip should have this under YTD
- Insurance Companies Year End Claim Summary - Print from insurance company's website  
- or Call them and have it mailed out to you
- Pharmacy Year End Summary Statement - Since you don't keep all the prescriptions' payment
- Dentist Year End Summary
- Medical Insurance Paid at your college / University for a medical plan
- Medical Fee paid outside of Canada

## Revenue Canada's Documents

**Retain them. You need them.**

### Previous years Notice of Assessment or Notice of Re-Assessment

This statement contains the following valuable info.

- Unused Federal and Provincial Tuition credit amounts
- RRSP Deduction Limit
- Unused RRSP amounts
- TFSA Contribution Limit
- HBP and LLP repayments

### Revenue Canada's Letters & Correspondences

- Revenue Canada sends letters and correspondences when they need to review anything.

## To get Direct Deposit Payments from Revenue Canada

**Direct Deposits are faster, safer, convenient, tractable deposits, and not lost like mail**

If you are already receiving direct deposit payment from Revenue Canada, then void cheque is not needed

- Void Cheque
  - Get a copy of your cheque and write the word "VOID" across

If you don't have a cheque, then

- Direct Deposit Request Print from your Bank

Note: When you move, you have to change address at Revenue Canada and your Bank. If you only change the address with the Bank, not Revenue Canada, cheque will be mailed out to your old address.

## Where to print Tuition Fee slip -T2202A?

**Student Web Services of Universities & Colleges**

U of T > ROSI	Centennial > myCentennial	George Brown > STU-VIEW
York > Passport York	Seneca College > SIRIS	U Waterloo > Quest
Ryerson > RAMSS	Humber College > SRS	McMaster > MUGSI
Lambton > WebAdvisor	Durham College > My Campus	Sheridan > Access Sheridan
Fleming > MyCampus		Mohawk > MOCOmotion