

**T4, T4A, T4E, T5007, T4PS, T4RIF, T4 RSP, T4OAS, T4AP**

Please provide all income slips, whichever are applicable to you and your family whose taxes need to be prepared.

Do not worry about missing slips, We can get access directly from CRA.

**INVESTMENT**

INCLUDE Slips provided by A financial institution.

Do not forget to provide accounting fees, management, investment counsel fees charged by financial institution to claim carrying charges and interest expenses.

**Note:** For investment in TFSA, you will not receive A T5, IT'S not taxable!

**PROFESSIONAL DUES**

**Note:** You can claim either box 44 from T4 or annual dues paid.

**RRSP CONTRIBUTION**

RRSP - make sure you know your contribution limit. You can get the limit from your Notice of Assessment (NOA) from last year or from your "MyAccount" on CRA.

First time home buyer limit is \$35,000.

We can always check your limit through CRA.

**INTEREST PAID ON STUDENT LOANS**

If you paid interest on your student loans please provide the receipt for the year interest paid.

**T2200 / T2200S**

Please provide signed forms by your employer and include all the details related to your employment.

Expenses include automobile, home office and percentage of business use.

You may be eligible to claim certain home office expenses if you work from home due to Covid-19 in 2021.

The form must be signed by an employer if you choose to claim a detailed method.

Otherwise, you can claim up to \$400 for the 2020 tax year and \$500 for the 2021 and 2022 tax year for the simplified method.

**Note:** You may be eligible to claim GST and HST Rebate.

**CHILD CARE EXPENSES**

Receipt should show the name of the child, amounts paid, date and year of payment, address of payee, and SIN or ID # of payee.



**CHARITABLE DONATION, POLITICAL CONTRIBUTION**

Should display amount paid, charitable registration number, date and year of payment, name and address of donor.

**ELIGIBLE DEPENDANT**

First and last name, date of birth, SIN, and relationship to you. You can claim non resident spouse as eligible dependant if you send money as per fair market value.

**TUITION CREDIT**

Official tuition receipt from school.

Form T2202 and other eligible tuition receipts over \$100.

Note: You can carry forward tuition amount from previous years. You can also transfer any unused amount to your parents or spouse if you are married.

**SUPPORT PAYMENT PAID/RECEIVED**

Amount you paid or received.

Provide first and last name and SIN for payee/payer.

**CANADA TRAINING CREDIT**

In the last sentence, update under fees paid for an occupational trade and professional examination in 2021.

**MEDICAL EXPENSES**

Statement from service provider indicated to summary and type of medical expense/services

Provide date and year of the services.

Note: Pharmacy and other service providers can provide you with an annual statement. Your insurance company can also provide you with the statement for the payment you paid from your pocket which was not covered by insurance company.

**SALE OF PRINCIPAL RESIDENCE**

You must report sale of principal resident by providing statement of adjustment at the time of sale/purchase and sale agreement.

You are eligible to claim full principal residence exemption.

**HOME ACCESSIBILITY TAX CREDIT**

Qualifying individuals can claim eligible home renovation expenses up to \$10,000 for work/services or purchase of goods.

**CAPITAL GAIN/LOSS**

Please provide statement from financial institution for your stock trading or you can ask your financial institution to provide you a statement of realized capital gain or loss.



## FOREIGN INCOME REPORTING

If you own foreign property (holding) more than \$100,000 at any time of the year, you must report it in form T1135 Foreign Income Verification Statement and submit it to CRA before April 30th

## RENTAL INCOME/LOSS

Address/details of rental income and eligible expenses, percentage of shares, and SIN.

## RENT

Name of the landlord and contact number.

Number of month rented during the year.

Property tax: Amount paid and name of municipality.

**Note:** This credit is only for low or medium income groups.

## NOTES

