

# Tax Season Checklist

The following is a list of items that we will need to begin work on your return; not every item may be applicable to you.

## Government Documents: (Usually a Pink Shade, the Type of Slip is indicated at Top Right of Document)

- T4 Income Slip** : Sent by employer, Usually Received In February or March.
- T3 Income Slip** : Sent by all Fund Companies, Usually received mid-March, may be as late as April.
- T5 Income Slip** : Sent by Banking Institutions for each Interest-bearing account.
- T4OA Slip** : If you collected Old Age Security during the calendar year, expect a T4OA Slip in February.
- T4A/P Slip** : If you collected any kind of pension income during the calendar year, expect a T4A in February.
- T4E Slip** : If you collected Unemployment Insurance during the calendar year, expect a T4E Slip in February.
- T5013 Slip** : If you contributed to a Flow Through, you will get one of these. Likely from Terra Capital.

## Investment Receipts: (Typically distributed by each fund and loan company in February or March).

- RRSP Contribution Receipts** : Commonly denoted RRSP Contribution Receipt at the Top Right of Document and distributed with 3 copies of the receipt.
- Flow Through Contribution Receipts (T5013)** : Generally from Terra Capital.
- Interest Paid Receipts** : Included with the December 31st Statement of all Investment Loans. Can be denoted as a Statement of your Loan, or Statement of Interest Charges.
- Line of Credit for Investment Income** : If you are using a Line of Credit for investment purposes, collect the December 31st statement of interest paid from your bank.

## Personal Receipts:

- Receipt of Rent Paid** : If you are a tenant and your income is below \$50,000, collect this from your landlord.
- Property Tax Receipt** : If household income is below \$50,000, submit your property tax receipt for filing.
- Union Dues** : If you are a member of a union or a professional organization, you should expect a yearly summary of fees paid in February. (Teachers, Nurses, Miners, all unionized workers)
- Charitable Donations** : Receipts from donations to all registered charities. (Church, Cancer Society, etc.)
- Political Contributions** : Receipts from contributions to political parties
- Interest Paid on Student Loans** : Receipt of Interest paid on Student loans.
- Education Fees** : Tuition (**T2202A**)
- Employment Expenses** : Please include a T2200 from your employer detailing the conditions of the expenses.
- Medical Care** : If you are on disability, please include attendant and other disability care expenses.
- Moving Expenses** : If you moved 40km away from your home for work.
- Receipts of Installments and Foreign Taxes Paid** : Include all receipts for paid installments and foreign taxes.

## Child Related Receipts:

- Support Payments Paid/Received** : Include all receipts for support payments.
- Tuition Receipts** : T2202As can be found on most University websites. Please sign the back if transferring.
- Child Care Expenses** : Include all receipts for Child Care, please note if you are a Single Parent.
- Legal Fees** : Include receipts for Legal fees relating to child support payments.

## Other:

Please notify us of any changes to your **address, marital status** or if you **had a child in this tax year**.

## Private Income Declaration:

If you earned income privately (Real Estate, Small Business) you must complete an income/expense worksheet and declare the income. No receipts will be accepted and our supplied forms must be completed in proper form. The forms may be found on our website at [www.rjmwealth.com](http://www.rjmwealth.com) under the Tools and Resources section.

Please ensure that all applicable items are emailed to [admin@rjmwealth.com](mailto:admin@rjmwealth.com) or couriered to our Mississauga office.