

Before you visit APlus Accounting Services, use this handy checklist to ensure you have all the documents your tax professional needs to help maximize your refund.

TAX SLIPS

- ☐ T4 – Employment income
- ☐ T4E – Employment Insurance income
- ☐ T4RSP – Registered Retirement Savings Plan (RRSP) income
- ☐ T4RIF – Registered Retirement Income Fund income
- ☐ T4A-OAS, T4AP – Old Age Security & CPP Benefits
- ☐ T3, T5, T5008 - Interest, dividends, mutual funds
- ☐ T2202A - Tuition / education receipts
- ☐ T5007 – Workers’ compensation/social assistance benefit
- ☐ All other information slips

RECEIPTS

- ☐ RRSP contributions
- ☐ Support for Child, Spouse or Common Law Partner
- ☐ Professional or union dues
- ☐ Tool expenses (tradesperson, apprentice & mechanics)
- ☐ Medical expenses
- ☐ Transit passes receipts
- ☐ Political donations
- ☐ Child care expenses
- ☐ Adoption expenses
- ☐ Moving Expenses
- ☐ Student loan interest
- ☐ Carrying charges and Interest expenses
- ☐ Office-in-home expenses
- ☐ Professional Certification exams expenses

OTHER DOCUMENTS REQUIRED

- ☐ 2018 Notice of Assessment/Reassessments / CRA Correspondence
- ☐ Mortgage Statement Current Year
- ☐ Sale or Deemed sale of stocks, bonds or real estate
- ☐ Northern resident's deduction
- ☒ Rental Income & Expense Records
- ☐ Sale or Deemed sale of stocks, bonds or real estate
- ☐ Business, farm or fishing income/expenses
- ☐ Automobile /travel logbook and expenses
- ☐ Disability Tax Credit Certificate
- ☒ Declaration of Conditions of Employment (T2200)
- ☐ Volunteer Firefighters certification
- ☒ Search and Rescue volunteer's certification
- ☐ Written certification for eligible educator school supplies

**** This checklist is not intended to be a complete list of all the possible documentation that you may need. Individuals should seek the advice of a professional in order to ensure they have the information and documentation appropriate to their specific situation**

If you have any questions or concerns and would like to make an appointment to talk to our financial advisor, please contact melissa@aplusas.ca or call 709-726-6539 or text – 709-764-7283.