

Shan iTax iPro

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Personal Income Tax Checklist

A best practice used for Shan'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 31st 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
- Home Renovation
- Moving Expenses - To start a new job

Education

- Tution 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

Children & Dependents

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

General

- Public Transportation (TTC, GOTransit, YRT)
- Donations
- Unions Fees
- Professional Dues
- Safety Deposit Box Rental
- Political Contributions
- Trade Person Tools Expenses

Medical Expenses

- Health Insurance Premium Paid at Work – Dec 31st 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