

Your personal information

We will need to know your full legal name, birthday, social insurance number, phone number(s), email address, home address, and citizenship for all household members.

Your income & Investments

Please include all sources of income:

- T4 slips
- T4E (employment insurance benefits)
- T3 / T5 (Interest, dividends, and mutual funds)
- RSP income slips
- T4A, OAS, T4AP (Pension, old age security and CPP)
- T5007 (Social assistance payments/worker's comp)
- RC62 (Universal child care benefits)

Deductible expenses & tax credits

You may be eligible to claim certain expenses on your own, or on your children's behalf. These include, but are not limited to:

- RRSP contribution slips
- Child/spousal support
- Child care expenses
- Professional/Union dues
- Medical expenses
- Charitable and political donations
- Children's art and fitness receipts
- Moving expenses
- Tuition
- Interest on student loans

Don't forget to mention if you're a first time home buyer or are making repayments under the home buyer's plan.

Rental income

If you own a rental property we will need your detailed records containing the rent collected and the expenses incurred. Some of these expenses include:

- property tax
- mortgage interest
- insurance costs
- repairs and maintenance
- utilities

Other information

If you incurred expenses for the purposes of your employment you should have received a T2200 (declaration of conditions of employment), we'll need that. Also, if you had a home office we'll need records of your home expenses which include:

- Utilities
- Repairs and maintenance
- Insurance and mortgage interest (for commission employees).
- Some additional items that we will need are:
 - Volunteer firefighters certification
 - Disability tax credit certificate
 - Automobile/travel log book.

Lastly, if you have your prior year's notice of assessment it's helpful to bring that in as well. It may contain carry forward information that may be applied to your current tax year.

It can be confusing trying to figure out exactly what deductions and tax credits you're eligible for; so, give us a call @ (506)389-3768 and we'll help you get the answer you need.

If you were self-employed please see our business tax guide.