

WHAT DO I NEED TO BRING?

The most helpful tool in preparing your tax return is your last years Notice of Assessment. If this is your first year with C & V Income Tax a copy of last years return would be useful. Listed below is a guideline of items used to prepare returns

INCOME:

Bring all slips or information that support the income you received for the year.

- T3 Investment Slips; Trust Income
- T4 Employment Income
- T4A Pension Income; Taxable Benefits; Wage Loss Replacement
Retiring Allowances; Scholarships & Grants
- T4A(P) Canada Pension Plan
- T4A(OAS) Old Age Security
- T4E Employment Insurance
- T4RSP Cashed In RRSP's; Homebuyers Withdraws
- T5 Investment Slips; Bank Interest; Stock Dividends
- T5007 Social Assistance; Workers Compensation
- RC62 Universal Child Care Benefit

You must self report any income you do not receive a slip for

- Rental Property Income - [See Rental Property Worksheet](#)
- Self Employed Income - [See Business Return Worksheet](#)
- Stocks and Trades
- Support Payments Received
- List any other income you received:

DEDUCTIONS:

- Child Care Expenses
- Employment Expenses – [requires T2200 or TL2 completed by your Employer](#)
- Interest on Investment Loans
- RRSP's – Including Deduction Limit & Any Homebuyers Plan Info
- Safety Deposit Box
- Union Dues / Professional Fees

CREDITS:

- Charitable
- Children's Fitness Credit
- Disability Tax Credit – [See Disability Tax Credit Information Sheet](#)
- Interest on Student Loans
- Medical Expenses – Including Dental; Chiropractor; Glasses;
- Public Transit Passes
- Rent or Property Tax Paid
- Tax Paid By Installments Enclosed **OR \$ _____**
- Tuition/Education (T2202A) - Including Carried Forward from Prior Years