



PERSONAL TAX RETURN CHECKLIST

Liberty Tax has compiled this list of income tax slips, receipts, and documentation to bring with you for your visit.

INCOME TAX SLIPS

Employers are required to have employment income slips prepared and mailed by February 28 to the address they have on file. If not received by March 8, check with your employer.

For T3 and T5 slips, your financial institution is required to mail them by March 15.

- T4 employment income
- Other income slips:
 - T4E Employment Insurance
 - T4A Pensions and annuities
 - T5007 Provincial assistance and WCB payments
 - T4A(P) Canada Pension Plan
 - T4A(OAS) Old Age Security
 - T4RSP & T4RIF RRSP and RIF income
 - T3 Trust income
 - T5 Investment income
 - T5018 Contract payments
- Other various income slips:
 - T4A-RCA, T4PS, T10, T101, T5008, T5013, RC210, foreign income

RECEIPTS

Canada Revenue Agency's (CRA) position is to disallow deductions and credits unless the taxpayer can prove they had the expense.

- Tuition slips T2202 (if transferring, ensure page 2 is signed accordingly)
- RRSP contribution slips
- Rent and/or property taxes (MB & ON only)
- Medical receipts (e.g., prescriptions, dental, eyeglasses, etc.)
- Registered charitable donations
- Political donations
- Interest paid on student loans
- Professional and/or union dues
- Carrying and interest expenses for investments
- Spousal support payments/income received (for payment deduction, a copy of court order is required)
- Attendant care expenses (for individuals with disabilities)
- Moving expenses (minimum move of 40 km for employment or education)

CHILDREN

- Dependant information
- Childcare expenses
- Adoption expenses
- Child support received

PROFESSIONAL

- Office in home (requires T2200 signed by employer)
- Tradespersons tool expense receipts
- Auto expenses

OTHER INFORMATION

- Fishing income and expenses (T2121)
- Clergy Residence Deduction (T1223)
- Capital gains/Adjusted cost base (ACB required for disposed stocks)
- Sold principal residence (information on purchase and sale)
- Rental property (income and expenses)
- Sale of rental property
- Self-employed (income and expenses including GST/HST information)
- Income not reported on slips

WHAT TO EXPECT

Upon arriving at the Co op, you should be asked to sign an AUT-01 form authorizing the companion office to be your representative at Canada Revenue Agency. The Co op will also ask for two pieces of identification, one must be a photo ID.

An intake form is completed with some basic information. The intake form along with the signed Authorization form and any documents you bring in will be securely transmitted to the Liberty Tax companion office.

The office will reach out and ask a series of questions to ensure Liberty obtains the highest refund possible for you. Liberty Tax will then prepare your tax return, provide you with a printed copy via the Co op, and will ask you to sign form T183 authorizing us to electronically file your return.

There may be additional forms to sign, depending on what is being reported and claimed in the return.

The Northern Residents deductions consist of a deduction for living costs (referred to as the residency deduction) and travel benefits. These deductions provide relief to those who live in a prescribed zone for at least six consecutive months beginning or ending in the tax year and recognize that such individuals are often faced with a higher cost of living, environmental hardships, and limited access to services.

Beginning in the 2021 tax year, there was a significant change to the travel portion of the Northern Residents deduction. Be sure to bring in travel information this year, even if you did not receive a taxable benefit from your employer.

Gather any information you have to support your eligibility for the Northern Residents deduction:

- Travel receipts
- Date(s) of travel
- Utility bills
- Rent receipts
- Statements from landlord
- Municipal taxes bill