

BRING YOUR KEY TAX RECORDS

GENERAL ITEMS

- 2022 notice of assessment
- T4 (employment); T4A (commissions and self-employed); T4E (employment insurance)
- T4OAS (old age security)
- T4A (pension, other income); T4A(P) (Canada Pension Income)
- T5 (investment income); T3 (income from trusts & mutual funds)
- T5007 (workers' compensation and social assistance payments)
- T5013 (partnership income)
- T4RSP/T4RIF
- RRSP contribution slips March 2023 to March 2024
- First time home savings plan slips April to December 2023
- Medical receipts (see Medical Checklist)
- Charitable & Political donations
- T2202(A) (tuition fees – self and dependents)
- Interest paid on student loan(s)
- Professional & Union dues
- Details of foreign investment and real estate holdings
- Foreign Pension Information
- Paid interest on Investment Loans
- Child and Spousal support income/payments – supporting documentation
- Separation agreement (if it is the first year)
- Child care expenses
- Property taxes/rent paid and to whom they were paid
- Details of stock transactions T5008 (shares sold and cost of those shares)
- Investment Portfolio Summaries, Mutual fund annual statements.
- Details of any cottage or investment property sales
- Details of residence sale, # years owned
- Attendant care expenses
- Educator supplies purchased
- Home accessibility expenses
- Digital News Receipts
- Transit passes (Seniors Only)
- Details of medical travel
- Labour Mobility Expenses (Accommodation and travel)
- Tradesperson tool expenses
- Multi-Generational Home Renovation Expenses

BUSINESS AND FARM INCOME

For details of what documents you should bring in, please contact your local TurnerMoore office.

WORK & TRAVEL EXPENSES

- Signed form TL2 (transportation employee meal allowance)
- Signed form T2200 from employer (conditions of employment form)
- Summary of auto operating costs (or receipts)
 - Fuel, Repairs, Insurance
 - Lease/Buy Info
 - Exp Reimbursements from Employer
 - Mileage Log**
- Advertising and promotion
- Cellular Telephone
- Hotels and Travel Costs
- Other expenses to earn this income
- Summary of Home Expenses including Insurance, Taxes, Repairs, Utilities, Mortgage Interest, office and house measurements.

US CONCERNS

A reminder that US Citizens must tax file US returns regardless of residency. For **Snowbirds**, you need to track all your days present in the US during the year so we may determine your US Filing requirements.

MOVING EXPENSES

- Movers Bill
- Truck rental
- Temporary Accommodations, Storage
- Meals
- Cost of selling old home
- Cost of buying new home
- Expense reimbursement from employer

RENTAL PROPERTY

- Address and number of units
- Rent collected per unit
- Mortgage interest
- Property taxes paid
- Utilities
- Repairs and maintenance
- Advertising
- Other rental expenses
- Insurance