Supported Self-Filing Tax Workshop Checklist

In order to file your taxes, you will first need to ensure you have all the required information and documents. This checklist will help you to gather what information and documents are needed. Please complete this checklist and bring these documents to your workshop date.

Required Personal Information Checklist

- ❑ Have an email address and password and are familiar with how to access your email account
- ❑ Social Insurance Number (SIN)
- ❑ Date of Birth
- ❑ Marital Status
- ❑ Mailing Address
  - If your address changed in 2023, you will also need the date that your address changed
- ❑ Last year's Notice of Assessment and/or Income Tax Return (if you filed last year). Your Notice of Assessment will include your:
  - NETFILE Access code
  - Tuition carry-forward amounts
  - RRSP deduction limit and unused amounts
- ❑ CRA My Account login information (if you have registered)

Required Documents Checklist

- ❑ Your income tax slips from all your income sources, which could include:
  - Employment income (T4)
  - Employment insurance and other benefits (T4E)
  - Pension, retirement, annuity, and other income (T4A)
  - Old Age Security and Canada Pension Plan slips (T4A(P) and T4A(OAS))
  - Investment income, interest, dividends, mutual funds (T3, T5, and T5008)
  - Tuition (T2202 or TL11)
  - Social assistance payments and worker’s compensation benefits (T5007)
  - Registered Retirement Savings Plan (RRSP) and Retirement Income Fund income (T4RSP, T4RIF)
  - Partnership income (T5013)
  - Self-Employed business income (T2125, T5013, T4A)
  - Rental income (T776)
- ❑ Your home address(es) and:
  - the total amount of rent you paid last year and name of landlord

    or
  - last year’s final property tax bill

Optional Documents Checklist

If you have any of the following documents, bring them with you to the workshop.

- ❑ Disability Tax Credit Certificate for self or dependents (T2201)
- ❑ Home renovation/accessibility expenses (if a senior or eligible for the Disability Tax Credit, or creating a multi-generational secondary unit)
- ❑ Employment expenses (T2200 signed by Employer)
- ❑ RRSP contribution receipts
- ❑ Medical expenses receipts
- ❑ Digital news subscription expenses
- ❑ Union dues receipt (if not included on your T4 slip)
- ❑ Charitable or political donation receipts
- ❑ Food donation amounts
- ❑ Investment advisor fees and interest expenses
- ❑ Home energy costs
- ❑ Relocation expenses (tradespersons)
- ❑ Examination fees for professional designations
- ❑ Legal expenses to collect alimony, pension, or retiring allowance
- ❑ Capital gains information (if no T5008 slips)
- ❑ Home buyers' plan and lifelong learning plan information
- ❑ First Home Savings Account contribution receipts (T4HSA)
- ❑ Information about the sale of your principal residence
- ❑ Tuition transfer amount from spouse or child
- ❑ Void cheque or letter from you bank/credit union with your bank information
    - This is for direct deposit if you haven’t already set up for direct deposit with the government or are not sure if you are set up for direct deposit.

- **Are you 65+ years of age?** Yes☐ No☐
  If "**yes**", collect your:
  - ❑ transit receipts (proof of purchase or transit usage report)

- **Are you the parent or guardian of child(ren) aged 0-19?** Yes☐ No☐
  If "**yes**", collect your:
  - ❑ Receipts for childcare expenses (e.g. daycare or camp, adoption expenses)
  - ❑ if you made or received child support payments last year, you will need the total amount paid/received
  - ❑ Information about your dependents
    - names and birthdates of children in your custody who are 0-19
    - Net income of dependents

- **Are you self-employed?** Yes☐ No☐
  If "**yes**", collect your:
  - ❑ Details about your income and expenses
  - ❑ Vehicle logbook
  - ❑ In-home office expenses

- **Are you a student attending college or university?** Yes☐ No☐
  If "**yes**", collect your:
  - ❑ Tuition fees receipt/T2202 form (found in your online student account)
  - ❑ Receipt for interest paid on student loans

- **Did you immigrate to Canada within the last year?** Yes☐ No☐
  If "**yes**", what was the exact date of your arrival in Canada?

If you arrived in Canada within the last year, you may also need to know the total amount of money (in Canadian dollars) that you earned in your home country before arriving in Canada last year.

- **Are you filing as a couple?** Yes☐ No☐
  If "**yes**", you will need:
  - ❑ Information about spouse/common-law partner
    - Date relationship status changed
    - Date of Birth
    - Social Insurance Number (SIN)
    - Net Income

Any questions?
Email: robynlewis@pickeringlibrary.ca
Phone: 905-831-6265 ext. 6261

If you aren't sure what documents you need to gather from the list above, let us know and we can guide you.

If you can't find any of your documents let us know and we can let you know how to request new copies.

If you have other documents that you think you'll need to file your taxes, please bring them with you to the workshop.

Note: you are required to keep all receipts from filing your taxes for 7 years in case you are audited by the Canada Revenue Agency.