

Heron Tax & Business Services

CHECKLIST - Information to bring to the Tax Office:

- Latest Notice of Assessment (NOA) from the CRA (Canada Revenue Agency)
Your NOA provides important information needed to prepare your tax return and commonly includes:
 - Tuition tax credits carried forward from a previous year
 - Capital & Non-Capital Losses carried forward from a previous year
 - RRPS Contribution Limit, Contributions carried forward & Home Buyers or Life-Long Learning repayments
- Statement of Tax Instalments Paid for the tax year from the CRA.
- T2200 Declaration of Conditions of Employment (from your employer – signed)
- TL2 Claims for Meals & Lodgings Expenses (from your employer – signed)
- GST370 Employee GST Rebate Application (from your employer – signed)

Common Sources of Income:

- T-Slips: (T4, T4E, T4A, T4RSP, T4PS, T4CPP, T4OAS, T4RIF, T5, T3, T5008, T5013, T5007)
- Income from Self-Employment or Rental Property
- Foreign Income from Pensions, Investments & Employment
- Capital Gains & Losses: Report of Security Trading Buys/Sells including the ACB / original cost
- Tips received or Investment / Bank Interest for which you did not receive a slip or receipt
- Spousal Support Payments Received that are taxable or deductible

Common Deductions:

- RRSP Contribution Slips
- Union & Professional Dues Paid Receipt
- Child Care, PreSchool, Summer/Winter Camps
** All receipts must clearly identify the Child, Tax Payer, Care Giver, Tax Year & Amount*
- Investment Advice / Management Fees **not RSP or TFSA related fees*
- Rental Property Expenses**
- Self-Employment Expenses**
- Employment Expenses** - T2200 (Declaration of Employment Expenses) Required from your employer
- Vehicle Mileage Log & Expenses**
- Business Use of Home Expenses**
*** Visit <https://www.canada.ca/en/revenue-agency.html> for a list of eligible expenses*

Common Non-Refundable Tax Credits:

- T2202 Tuition Slips & Interest Paid on Student Loans
- Coach/Teacher school supplies receipts for tax credit
- Medical, Dental, Eyecare, Hearing Aids & Batteries, Prescriptions, Therapy, Extended Health, Dental & Travel Medical Insurance Premiums paid personally (not MSP)
*** Visit <https://www.canada.ca/en/revenue-agency.html> .. search for eligible medical expenses*
- Donations & Political Contributions
- Volunteer Firefighter .. Letter required from Chief (min 200 hours)
- Search & Rescue Volunteer .. Letter required from Lead (min 200 hours)
- First Time home Buyers .. copy of Property Purchase Agreement required
- Disability Tax Credit .. Eligibility Letter from CRA if this is your first year to claim this tax credit
- Caregiver Amount .. Eligibility Letter from the doctor
- T1014 BC Training Tax Credit on Eligible Programs