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TAX CLINIC CHECKLIST

SELECTION CRITERIA

Personal tax preparation service is available at no charge to individuals:

- Without dependants with a gross household income of less than $35,000
- With dependants, including a spouse or equivalent, with a gross household income of less than $45,000 for a household of two (add $2,500 for each additional person)

Volunteers do not prepare complex returns, such as returns for individuals who:

- Have self-employment income
- Have business or rental income
- Have capital gains or losses
- Have employment expenses
- Have interest income greater than $1,000
- File for bankruptcy
- Are deceased

WHAT YOU NEED TO BRING

1. A photo ID (e.g., driver's licence, passport)
2. A copy of completed **2017 income tax return** and **2017 Notice of Assessment** (if available)
3. Social Insurance Number for you and your spouse/common-law partner
4. List of dependants and birth dates (day, month, year); Social Insurance Number for each dependant (if available)
5. Details of spouse's income and dependant's income
6. Date of marriage or separation (if in 2018)

7. Details of any alimony and maintenance payments received or paid
8. If a new immigrant, date of arrival in Canada
9. If first time home buyer, details of home purchase
10. If you sold a principal residence and have no capital gain because you are eligible for the full exemption, the following information on the sale is required: the year of acquisition, the sale price or amount you received for the property and the description/address of the property
11. All receipts of income, for example:
    - Salary and wages **T4**
    - Statement of Pension, Retirement, Annuity and Other Income **T4A** (Scholarships)
    - Old Age Security **T4A (OAS)**
    - Canada Pension Plan benefits **T4A(P)**
    - Employment Insurance benefits **T4E**
    - Registered Income Fund income **T4RIF**
    - Registered Retirement Savings Plan income **T4RSP**
    - Interest and Dividend payments **T5**
    - Statement of interest trust **T3**
    - Worker's Compensation/Social Assistance Payments **T5007**
    - Child Care Benefit Statement **RC62**
    - Working Income Tax Benefit Advance Payments Statement **RC210**
    - All foreign income receipts/statements
    - US Social Security Statement (including the year client(s) started collecting)
12. All receipts of expenses, for example:
    - Property taxes and/or details of total rent paid during the year and all addresses of places of residence during the year and name(s) of landlord

- Child care expenses (plus caregiver’s Social Insurance Number) - including **Form T778**
- Medical expenses
- Charitable and political donations
- Child fitness, arts and other qualifying activity receipts
- Public transit passes and receipts, and electronic payment cards
- Union or professional dues
- Tuition amount (**T2202/T2202A**)
- Student loan interest
- RRSP contributions
- If this is the first year of a disability credit claim, or if the previous one had expired, a copy of the disability certificate **Form T2201**
- For a person who is either a senior (65 or older) or eligible to claim the disability credit OR a family member living with them, include receipts for permanent home modifications that improve accessibility or help the person be more functional, mobile, reduce risk of harm or to gain access to the home.