

## **Your Pre-Appointment Checklist – [www.raybergtax.com](http://www.raybergtax.com)**

### **Slips**

- ✓ All T4 slips (Employment income)
- ✓ Employment insurance benefits (T4E)
- ✓ Interest, dividends, mutual funds (T3, T5, T5008 w/cost or book value)
- ✓ Tuition / education receipts (T2202A)
- ✓ Old Age Security and CPP benefits (T4AOAS, T4AP)
- ✓ Other pensions and annuities (T4A)
- ✓ Social assistance payments (T5007)
- ✓ Workers' compensation benefits (T5007)
- ✓ All other information slips

### **Receipts**

- ✓ RRSP contribution slip
- ✓ Child or Spousal Support
- ✓ Professional or union dues
- ✓ Tool expenses (Tradespersons)
- ✓ Medical expenses
- ✓ Rent Receipts/Property Tax Receipt
- ✓ Charitable donations
- ✓ Political contributions
- ✓ Childcare expenses
- ✓ Adoption expenses

- ✓ Moving expenses
- ✓ Interest paid on student loans
- ✓ Carrying charges and interest expenses
- ✓ Office - in-home expenses
- ✓ Exams for professional certification

### **Other documentation**

- ✓ Notice of Assessment/Reassessment
- ✓ Canada Revenue Agency correspondence
- ✓ Details on Sale or deemed sale of stocks, bonds or real estate
- ✓ Details on the Sale of your principal residence
- ✓ Eligible Educator school supplies receipts
- ✓ Northern residents deductions
- ✓ Rental income and expense records
- ✓ Business, farm or fishing income/expenses
- ✓ Automobile / Travel logbook and expenses
- ✓ Disability Tax Credit Certificate
- ✓ Declaration of Conditions of Employment (T2200)
- ✓ Volunteer Firefighters certification