

Personal Tax Preparation Checklist

In order to ensure the right information is collected when it comes to your taxes, we have prepared a checklist for you. Please read thoroughly and carefully to ensure all items are brought in.

Personal Records

- ☐ **Individual slips and receipts**
 - ☐ 2021 tax return, Notice of Assessment and any other CRA correspondence
- ☐ **Investment information:**
 - ☐ RRSP contribution slips
 - ☐ T3 slips
 - ☐ T5 slips
- ☐ **If you have other income:**
 - ☐ T4: Statement of remuneration paid
 - ☐ T4A: Pension, retirement, annuity and other income
- ☐ **Receipts for eligible medical expenses**
- ☐ **Receipts for charitable donations**
- ☐ **Tuition or educational expenses**
- ☐ **Interest paid on student loans**
- ☐ **Child care expenses**
- ☐ **Moving expenses**

If you have any questions on the information required to be collected, feel free to contact us through our website at www.mickiesfinancialservices.com