

TAX CHECKLIST

SLIPS

T4 - Employment Income

T4E - EI Benefits

T5, T3, T5008 - Investment Income

T2202A - Tuition Receipts

T4A - Pension/Other Income (Covid Benefits)

T4A-P & T4A-OAS - CPP & OAS Benefits

T5007 - WSIB or Social Assistance

Other information slips

RECEIPTS

RRSP Contributions

Child Support/Alimony Payments

Professional/Union Dues

Employment related expenses

Medical expenses

Accessibility home renovations (seniors & disabled)

Donations (charitable & political)

Child care expenses

Adoption expenses

Moving expenses

Student loan interest

Interest, carrying charges, and account management

fees for investments

OTHER DOCS

NEW CLIENTS

Prior year's tax return/notice of assessments

New client intake form*

Authorization form

RETURNING CLIENTS

Notice of re-assessments (if any)

Returning client intake form* (only if changes to details)

ALL CLIENTS

Details on sale of principal residence

Business, rental, or farm documents

Transport truck driver logs

Disability tax credit (if new)

*Forms available on our website:
www.hoffmanps.com/forms

Please note this is a non-exhaustive list of tax documents you should bring. We tried to combine all the most common documents. If you have other documents you feel should be included, please bring them with you.