

Maria Dekhtiarenko
Your Partner for Success



Telephone: 204-230-3803
Fax: 1-844-230-3803
maria.dekhtiarenko@gmail.com

tax planning
investments
insurance

TAX READINESS CHECKLIST 2019

All Taxpayers

- Last year's tax return**
- Last year's CRA **Notice of Assessment**
- Medical expense** receipts
- Private **Health plan** premiums
- Donation receipts

Parents

- Child care** receipts
- Receipts for **sport camps**
- Fitness** receipts
- Arts** receipts
- Unused educational amounts (form T2202A with your child signature)

Students

- All **T2202A forms** from school(s)
- T4A** for **scholarships** and **bursaries**
- Receipts for **Student loan interest**
- Diploma/Certificate** along with all **T2202As** for previous tax years **if graduated in 2007 or later**

Seniors

- All **T4A(P)** and **T4A(OAS)** slips
- All **T4As** from private pension funds
- T4RSP** and **T4RIF** from your RRSP income

Employees

- All **T4 slips**
- Union and professional dues**
- Last pay stub** from previous year
- Medical insurance premiums** paid through work
- T2200** - Declaration of conditions of employment (for tradepersons, apprentice mechanics etc)
- Log Books** for truck drivers

Investors

- T3, T5** and other investment info
- RRSP, T4RSP** receipts
- T5008** form or cost & revenues for securities sold

Renters/Homeowners

- Rent** receipt(s)
- Receipt for **Rent Assistance** received
- Property tax** receipt
- Amounts required to repay the **RRSP Home Buyers** amounts (see CRA's Notice of Assessment)
- Paperwork from your lawyer **for the purchase of your new home/selling old residence**

New Clients/New Immigrants

- SIN, PR card, Manitoba Health card
- Information for Direct Deposit