



2017 Tax Checklist for Post-Secondary Students

We have prepared this checklist to help you assemble your financial information for preparation of your income tax return. To be of full use, the checklist should be completed and returned to us together with the financial information assembled.

| (√) IF APPLICABLE TO YOU | PROVIDE |
|---|---|
| <input type="checkbox"/> Last Year's Notice of Assessment | Bring a copy (ALL PAGES) |
| <input type="checkbox"/> Any Notice of Assessment received from CRA during the year | Bring a copy (ALL PAGES) |
| <u>INCOME</u> | |
| <input type="checkbox"/> Regular earnings | All T4's or pay slips |
| <input type="checkbox"/> Odd jobs, tips | Pay slips, details |
| <input type="checkbox"/> Scholarships, bursaries and study grants | T4A; <i>OSAP usually mails this form to you</i> |
| <input type="checkbox"/> RESP Withdrawals | T4A; <i>from investment company for taxable portion of money received</i> |
| <input type="checkbox"/> Other | Details |
| <u>INVESTMENT INCOME</u> | |
| <input type="checkbox"/> Interest - savings account | T5 slips or pass books |
| <input type="checkbox"/> Term deposits or G.I.C.'s | T5 slips or details |
| <input type="checkbox"/> Mutual fund investment income | T3 slips or statements |
| <input type="checkbox"/> Dividends - Canadian corporations | T5 slips |
| <input type="checkbox"/> Interest - Canada Savings Bonds | T5, T600 or T600C slips (Details if no slips - for accrual) |
| <u>DEDUCTIONS AND CREDITS</u> | |
| <input type="checkbox"/> Tuition fees over \$100 paid (post-secondary) | Form T2202 or T2202A <i>This can be accessed online on your student portal.</i> |
| <input type="checkbox"/> Interest on student loans | Receipts <i>Amounts paid in the current year or paid in the past five years which have not been claimed</i> |
| <input type="checkbox"/> RRSP contributions | Official Receipts |
| <input type="checkbox"/> Donations to registered charities | Official tax receipts |
| <input type="checkbox"/> Unused prior year donations | Full details |
| <input type="checkbox"/> Rent paid | Receipts from landlord for amounts paid. <i>Please provide name of Landlord, address of rental property and the number of months rented.</i> |
| <input type="checkbox"/> Public transit passes | Receipts |
| <input type="checkbox"/> Medical Expenses | Receipts, summaries, etc <i>for any 12 month period ended in the tax year, including private insurance (ie. Blue Cross, travel health ins.) and premiums</i> |