



2021 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 or Notice of Reassessment's 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"/>	Office in home due to COVID19	Number of days worked from home during year
<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"/>	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>