

WeCount 4U Financial Services
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Client Check List

Slips

- ☐ T4 slips (Employment income)
- ☐ Employment insurance benefits (T4A or T4E)
- ☐ COVID-19 relief repayments (T4A)
- ☐ Interest, dividends, mutual funds (T3, T5, T5008)
- ☐ T2202 Tuition and Enrollment Certificate
- ☐ Old Age Security and CPP benefits (T4A-OAS, T4AP)
- ☐ Other pensions and annuities (T4A)
- ☐ Social assistance payments (T5007)
- ☐ Workers' compensation benefits (T5007)
- ☐ Advance Canada Workers Benefit (CWB) payments (RC210)
- ☐ Any other information slips

Receipts

- ☐ RRSP contribution receipts
- ☐ First Home Savings Account (FHSA) contribution receipts
- ☐ T4FHSA Slip: First Home Savings Account Statement
- ☐ Support for a child, spouse, or common-law partner
- ☐ Professional or union dues
- ☐ Tool expenses
- (Tradespersons & apprentice mechanics)
- ☐ Office-in-home expenses

- ☐ Other employment expenses
- ☐ Teacher's school supplies
- ☐ Medical expenses
- ☐ Home renovations (seniors and disabled)
- ☐ Multigenerational home renovation tax credit
- ☐ Charitable donations
- ☐ Political contributions
- ☐ Childcare expenses
- ☐ Adoption expenses
- ☐ Moving expenses
- ☐ Interest paid on student loans
- ☐ Carrying charges and interest expenses
- ☐ Exams for professional certification
- ☐ Digital news subscription
- ☐ Labor Mobility Deduction for Tradespeople

Other documentation

- ☐ Notice of Assessment/Reassessment
- ☐ Canada Revenue Agency correspondence
- ☐ Sale of principal residence
- ☐ Sale or deemed sale of stocks, bonds, or real estate
- ☐ Northern residents deductions receipts
- ☐ Rental income and expense receipts
- ☐ Business, farm, or fishing income/expenses
- ☐ Automobile/Travel logbook and expenses
- ☐ Disability Tax Credit Certificate
- ☐ Declaration of Conditions of Employment (T2200)
- ☐ Volunteer Firefighters certification
- ☐ Search and Rescue volunteers' certification
- ☐ Written certification for eligible educator school supplies
- ☐ _____