



The following is a list of items that we will need to begin work on your return; not every item may be applicable to you.

Government Documents: (Usually a Pink Shade, the Type of Slip is indicated at Top Right of Document)

- **T4 Income Slip** : Sent by employer, Usually Received In February or March
- * - **T3 Income Slip** : Sent by all Fund Companies (Acuity, TD, etc.), Usually received mid-March, may be as late as April
- **T5 Income Slip** : Sent by Banking Institutions (CWT, PC, ING, RBC, etc.) for each Interest-bearing account.
- **T4OA Slip** : If you collected Old Age Security during the calendar year, expect a T4OA Slip in February.
- **T4A/P Slip** : If you collected any kind of pension income during the calendar year, expect a T4A in February.
- **T4E Slip** : If you collected Unemployment Insurance during the calendar year, expect a T4E Slip in February.
- **T5006 Slip** : If you contributed to a Labour Sponsored Investment Fund (CI, Dynamic), expect a T5006.

Investment Receipts: (Typically distributed by each fund and loan company in February or March.)

- * - **RRSP Contribution Receipts** : Commonly denoted RRSP Contribution Receipt at the Top Right of Document and distributed with 3 copies of the receipt. (B2B Trust, Dynamic, CI/VentureLink, TD, SunLife, etc.)
- * - **LSIF Contribution Receipts (T5006)** : Packaged with RRSP Receipts from CI/VentureLink or Dynamic.
- * - **Interest Paid Receipts** : Included with the December 31st Statement of all Investment Loans. Can be denoted as a Statement of your Loan, or Statement of Interest Charges. Received from B2B Trust, AGF Trust, Banks, etc.
- **Line of Credit for Investment Income** : If you are using a Line of Credit for investment purposes, collect the December 31st statement of interest paid by your bank. (Scotiabank, etc.)
- **Fees Paid at Acuity or Dynamic**: If you have any funds invested in a Pooled Version of Acuity or Dynamic Funds, you will receive a document outlining the fees paid for the year. Expect this receipt in March.
- * - **Year-End Statements** : December 31st Statements for all Mutual fund Companies. (Mackenzie, TD, Dynamic)

Personal Receipts:

- **Receipt of Rent Paid** : If you are a tenant and your income is below \$50000, collect this from your landlord.
- **Property Tax Receipt** : If household income is below \$50000, submit your property tax receipt for filing.
- **Union Dues** : If you are a member of a union or a professional organization, you should expect a yearly summary of fees paid in February. (Teachers, Nurses, Miners, all unionized workers)
- **Charitable Donations** : Receipts from donations to all registered charities. (Church, Cancer Society, etc.)
- **Political Contributions** : Receipts from contributions to political parties
- **Interest Paid on Student Loans** : Receipt of Interest paid on Student loans.
- **Education Fees** : Tuition (**T2202A**), Books & Bus Pass Receipts for Students.
- **Employment Expenses** : Please include a T2200 from your employer detailing the conditions of the expenses.
- **Medical Care** : If you are on disability, please include attendant and other disability care expenses.
- **Moving Expenses** : If you moved 40km away from your home for Work, please contact Al Folino, ext. #235
- **Receipts of Installments and Foreign Taxes Paid** : Include all receipts for paid installments and foreign taxes.
- **Partnerships/Tax Shelters** : Include receipts for contributions/ownership via T5013 or T101. *

* RJMwealth does not advocate the use of Tax Shelters as a tax planning tool, nor do we encourage their use.

Child Related Receipts:

- **Support Payments Paid/Received** : Include all receipts for support payments.
- **Child Care Expenses** : Include all receipts for Child Care, please note if you are a Single Parent.
- **Legal Fees** : Include receipts for Legal fees relating to child support payments.
- **Fitness Credit** : Receipts for Fitness or Exercise related expenses for children under the age of 16.

Other Documents:

- **Most Recent NOA** : New Clients need to send us their most recent Notice of Assessment
- **T183E** : All clients that file with us must sign sections E and F of the T183E that can be found on the website.

Private Income Declaration: If you earned income privately (Real Estate, Small Business) you must complete an income/expense worksheet and declare the income. No receipts will be accepted and our supplied forms must be completed in proper form. The forms may be found on our website at www.IntegraWealth.ca under the Resources Menu, Income Tax Information Tab

*** These documents are very important for all clients using the Wealth Advantage Plan. Please make sure to include them.

Please ensure that all applicable items are included, then courier or drop off the package at our Sudbury or Barrie office between April 1st and 21st. Please do not hesitate to contact us with any questions, we will be glad to help.