INCOME TAX CHECKLIST

To ensure that your return is completed accurately, please ensure that you have all of the necessary information as it applies to your situation:

Free Income Tax Clinic Schedule Monday, March 2nd until Thursday, April 30th					
	Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
9:00am - 12:00pm	Open Closed from12-1pm	Open Closed from12-1pm	Closed	Open	Open
1:00pm - 4:00pm	Open	Open	Open	Closed	Closed
4:00pm - 7:00pm	Closed	Closed	Open	Closed	Closed

What information do you need to bring?

- ☐ A copy of your completed 2013 income tax return and your 2013 Notice of Assessment
- ☐ Your Social Insurance Number and the Social Insurance Number of your Spouse/Common-Law Partner
- ☐ List of your dependents and their birthdates (day, month, year)
- ☐ The Social Insurance Number for each dependent (if available)
- ☐ Details of spouse's income and dependent's income
- ☐ Date of marriage or separation (if in 2014)
- ☐ Details of any alimony and maintenance payments received or paid
- ☐ If a new immigrant, date of arrival in Canada
- ☐ If first time buyer, details of home purchase

What income did you make last year?

- ☐ Salary and wages **T4**
- ☐ Statement of Pension, Retirement, Annuity and Other Income **T4A** (Scholarships)
- ☐ Old Age Security **T4A (OAS)**
- ☐ Canada Pension Plan benefits **T4A(P)**
- ☐ Employment Insurance benefits **T4E**
- ☐ Registered Income Fund income **T4RIF**
- ☐ Registered Retirement Savings Plan income **T4RSP**
- ☐ Interest and Dividend payments **T5**
- ☐ Statement of interest trust **T3**
- ☐ Worker's Compensation/Social Assistance Payments **T5007**
- ☐ Universal Child Care Benefit Statement **RC62**
- ☐ Working Income Tax Benefit Advance Payments Statement **RC210**
- ☐ All foreign income receipts/statements
- ☐ US Social Security Statement (including the year client(s) started collecting)

Drop In
To have your taxes done

or

Drop Off
Your tax information and will contact you when we have completed your return

Come join us at:
The Working Centre
58 Queen Street South
Kitchener, Ontario
(519) 743-1151

What were your expenses last year?

- ☐ Property taxes and/or details of total rent paid during the year and all addresses of places of residence during the year and name(s) of landlord
- ☐ Child care expenses (plus caregiver's Social Insurance Number) - including Form **T778**
- ☐ Medical expenses
- ☐ Charitable and political donations
- ☐ Child fitness, arts and other qualifying activity receipts
- ☐ Public transit passes and receipts, and electronic payment cards
- ☐ Union or professional dues
- ☐ Tuition fees/education amount **T2202/T2202A**
- ☐ Student loan interest
- ☐ RRSP contributions
- ☐ If this is the first year of claim, or if the previous one had expired, a copy of the disability certificate Form **T2201**
- ☐ For a senior (65 or older) or non-senior living with a family member who is a senior, include receipts for permanent home modifications that improve accessibility or help the senior be more functional/mobile (e.g., grab-bars installed in the shower or bathroom)

We can serve Tax-filers:	
Single Person	Up to $30,000
Couple	Up to $40,000
One adult with one child	Up to $35,000
Each additional dependant	Up to $2,500
Interest income less than	$1,000

Types of Tax-filer we cannot serve

- Bankruptcies (during 2014)
- Self Employed Individuals or Expenses
- Business/Rental Income or Expenses
- Capital Gains or Losses