

To simplify your tax-filing experience, we've compiled a list of what you can **start collecting** for this tax-filing season. Please consult your trusted advisor at Zeifmans for guidance on submitting these items.

Tax Records Checklist

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|--|--|
| <input type="checkbox"/> Notice of Assessment | <input type="checkbox"/> Charitable donations receipts |
| <input type="checkbox"/> All T4, T3, T5, T4A, T4E, T4A (P), T4A (OAS), T5007 & T5008 | <input type="checkbox"/> Rent or property tax receipts |
| <input type="checkbox"/> RRSP contribution receipts | <input type="checkbox"/> Interest paid on student loan(s) |
| <input type="checkbox"/> RRSP income or withdrawals (T4RSP) | <input type="checkbox"/> Rental income and expenses |
| <input type="checkbox"/> CPP benefits | <input type="checkbox"/> Medical expenses |
| <input type="checkbox"/> Employment income medical expenses receipts | <input type="checkbox"/> Business income and expenses |
| <input type="checkbox"/> Tuition & education receipts T2202, T4A | <input type="checkbox"/> Home office expenses (for self-employed) |
| <input type="checkbox"/> Exams for professional certificate | <input type="checkbox"/> Automobile expenses (for self-employed) |
| <input type="checkbox"/> Professional membership(s) | <input type="checkbox"/> Employment expenses (T2200) |
| <input type="checkbox"/> Daycare & babysitting receipts | <input type="checkbox"/> Political contributions |
| <input type="checkbox"/> Vehicle/mileage expenses | <input type="checkbox"/> Sale or deemed sale of stocks, bonds or real estate |
| <input type="checkbox"/> Moving costs | |

Important Telephone Numbers

Personal

Personal Income Tax 1 800 959 8281

Child Tax Benefit 1 800 387 1193

Personal GST/HST Tax Credit 1 800 387 1193

Ontario Trillium Benefit 1 866 668 8297

Tax Instalments 1 800 959 8281

Business/Corporation

Corporation Tax, Payroll & Business HST

1 800 959 5525

Online Access to CRA Accounts

Personal Income Tax

www.cra.gc.ca/myaccount

Business Accounts

www.cra.gc.ca/mybusinessaccount

Interested in connecting with us or referring a friend? Please use the contact details below or reach out to your Zeifmans Advisor.