



STUDENT TAX CHECKLIST

Post-Secondary Students

Check off everything that applies, gather those documents, and send them to us.

Even with little or no income, file – you build RRSP room, claim tuition, and may receive the GST/HST credit.

A ABOUT YOU

Social Insurance Number (SIN)

Full legal name, date of birth, address & postal code

Marital status (and date of any change this year)

Spouse / common-law partner: name, SIN, DOB, net income (if any)

Direct deposit: void cheque OR account / transit / institution number

Last year's Notice of Assessment (new clients)

Tips, cash, or other income not on a slip

B INCOME SLIPS – all you received

T4 – part-time / summer / co-op employment

T4A – scholarships, bursaries, grants, RESP payments

T4E – Employment Insurance (EI) benefits

T5 – interest, dividends, investment income

T3 – trust or mutual-fund income

T5007 – social assistance / workers' compensation

C DEDUCTIONS & CREDITS – keep receipts

T2202 – tuition (claim yours, or transfer to a parent/spouse)

Student loan interest – government loans only

Moving expenses (moved 40 km+ closer for school or a job)

FHSA / TFSA / RRSP contribution records

Medical expenses (prescriptions, dental, etc.)

Charitable & political donation receipts

Childcare expense receipts (if applicable)

Rent or property tax paid – for provincial credits (if eligible)

D SIGN & RETURN – we send these to you

Individual Tax Interview Form – completed & signed

Privacy Policy – signed

Authorization Form (AUT-01) – signed, lets us file for you