

INCOME TAX CHECKLIST FOR HOSTS

WHAT INFORMATION DO PARTICIPANTS NEED TO BRING?

- Social Insurance Number
- Couples:
 - Couples need to be seen together OR
 - We can process one parties return, we require spouses Full Name, SIN and net income
- Families:
 - Details re dependents including full names, birthdate(s), disabilities, expenses, income
- Other:
 - Date of marriage or separation (if it happened in 2018)
 - Details of any alimony and maintenance payments received or paid
 - If a new immigrant or International Student: date of arrival in Canada

INFORMATION SLIPS

➔ ***We can call Revenue Canada at 1 800-959-8281 with the Participant(s) if any are missing. Fill in our form with info received from Revenue Canada***

- T4** Salary and wages
- T4A** Pension, Retirement, Annuity and Other Income (Scholarships)
- T4A (OAS)** Old Age Security
- T4A(P)** Canada Pension Plan benefits
- T4E** Employment Insurance benefits
- T4RIF** Registered Income Fund income
- T4RSP** Registered Retirement Savings Plan income
- T5** Interest and Dividend payments
- T3** Statement of interest trust
- T5007** Worker's Compensation/Social Assistance Payments
- RC210** Working Income Tax Benefit Advance Payments Statement

WHAT WERE THE EXPENSES LAST YEAR?

- Rent /Property Taxes paid, addresses for all residences
- Medical expenses – 3% of net income OR \$2,208 (whichever is less)
- Charitable and political donations
- Professional dues
- T2201** Disability Certificate Form
- T2202/T2202A** Tuition fees/education amount
- Student loan interest
- Child care expenses (plus caregiver's Social Insurance Number) - including Form **T778**
- RRSP contributions

INCOME TAX CHECKLIST FOR HOSTS

1. Checklist

- Does the individual or family income level qualify for free tax preparation?
- Have you gone through each item in **Income Tax Checklist** form?
- Have you made notes on the waiting list for the Preparers?
- Does the participant have any missing T-_____ forms? If Yes, call Revenue Canada with them.
- Does the participant have Direct Deposit currently? If not, please assist them to get info.

2. For Drop-off Participants Only

- Drop-off Screening Sheet
- Release of Information** Has each Participant signed off on the release of information?
- TIS60** – Are **Part B** and **Part D** signed for each Participant's Tax Return?
- Envelope** Have you filled in all of the required information on the envelope label?
- Filing Cabinet** Have you put the participant's envelope in the locked filing cabinet?

This resource comes from The Working Centre in Kitchener-Waterloo, ON, and is current as of 2018. For more information about this resource, please contact Jen Smerdon: jens@theworkingcentre.org