|  |  |
| --- | --- |
| **Documents Checked By: (Volunteer Name – Please Print Clearly)** | **Tax Year(s)****2018 / 2019** |
| **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  |  |
| **ID Verification** | **Family Head** | **Spouse** | **Dependents** | **Comments** |
| ID Verified (check mark) |[ ] [ ] [ ]  Click or tap here to enter text. |
| **Newcomer to Canada** | **Family Head** | **Spouse** | **Dependents** | **Comments** |
| Arrived in Canada in 2019  | Choose an item. | Choose an item. | Choose an item. | Click or tap here to enter text. |
| Date of Entry | Click or tap to enter a date. | Click or tap to enter a date. | Click or tap to enter a date. | Click or tap here to enter text. |
| Country | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
| Foreign Income (earned in 2019 prior to coming to Canada)\*please specify currency­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
| **Income Source** | **Family Head** | **Spouse** | **Dependents** | **Comments** |
| T4 |[ ] [ ] [ ]  Click or tap here to enter text. |
| T4E |[ ] [ ] [ ]  Click or tap here to enter text. |
| T5007 |[ ] [ ] [ ]  Click or tap here to enter text. |
| T4A |[ ] [ ] [ ]  Click or tap here to enter text. |
| T4A(OAS) |[ ] [ ] [ ]  Click or tap here to enter text. |
| T4A(P) |[ ] [ ] [ ]  Click or tap here to enter text. |
| T4RSP / T4RIF |[ ] [ ] [ ]  Click or tap here to enter text. |
| T5 / T3 |[ ] [ ] [ ]  Click or tap here to enter text. |
| Other:  |[ ] [ ] [ ]  Click or tap here to enter text. |
| **Deductions/Credits** | **Family Head** | **Spouse** | **Dependents** | **Comments** |
| Union or professional dues |[ ] [ ] [ ]  Click or tap here to enter text. |
| RRSP Contribution Receipts |[ ] [ ] [ ]  Click or tap here to enter text. |
| Medical Expenses |[ ] [ ] [ ]  Click or tap here to enter text. |
| Charitable Donations |[ ] [ ] [ ]  Click or tap here to enter text. |
| T2202A Tuition |[ ] [ ] [ ]  Click or tap here to enter text. |
| Ontario Senior Public Transit Credit |[ ] [ ] [ ]  Click or tap here to enter text. |
| Disability Tax Credit  |[ ] [ ] [ ]  Click or tap here to enter text. |
| Other: | Click or tap here to enter text. |[ ] [ ]  Click or tap here to enter text. |
| **Ontario Trillium Benefits** | **Family Head** | **Spouse** | **Dependents** | **Comments** |
| Ontario Trillium Benefit (OEPTC) |[ ] [ ]   | Click or tap here to enter text. |
| [ ]  Rent Receipt / [ ]  Property Tax | Click or tap here to enter text. | Click or tap here to enter text. |  | Click or tap here to enter text. |
| Ontario Senior Homeowners Property Tax Grant (OSHPTG) |[ ] [ ]   | Click or tap here to enter text. |
| Canada Child Benefit (CCB) |[ ] [ ]  Click or tap here to enter text. | Click or tap here to enter text. |
| **Direct Deposit** | **Family Head** | **Spouse** | **Dependents** | **Comments** |
| Start/Change direct deposit |[ ] [ ] [ ]  Click or tap here to enter text. |
| **Additional Comment and Notes for Tax Preparer** |
|  |

[this Document Check form was used by Woodgreen in 2020 and is included as an example]