

How to get ready to file your taxes with the supported tax filing program

Use this list to create an online TurboTax account and gather the documents you will need to file your taxes

Part One: Create an Online TurboTax Account

Follow the steps below or watch this [how to video to learn how to create an account](#)

1. Visit www.turbotax.ca/taxclinic. You will see a “Create your account” page
2. Enter your email address and use it for your User ID as well
3. Write down your User ID and password in a safe place because you will need it to log into your account
4. Once you have entered all your information, click orange ‘Create Account’ button

Congratulations! You have successfully created a TurboTax account!

If you’d like to learn more watch these [Turbo Tax videos](#)

Part Two: gather tax documents for yourself and your spouse/common law partner. Make notes on this sheet and gather your documents in a folder or envelope. *(If you aren’t sure what documents you need to gather from the list below, let us know and we can guide you.)*

- Social Insurance Number (SIN): _____
- Last year's Notice of Assessment and/or Income Tax Return
- Photo ID *(If photo ID is not available, you will need to show two government letters/bank statements/utility bills with your full name and address)*
- Your income tax slips from all your income sources
- For example, T4 slip for employment, T5007 slip for OW or ODSP, T4A(OAS) and T4A(P) for pensions*
- Your home address(es) and:
 - the total amount of rent you paid last year and name of landlord **or**
 - last year’s final property tax bill
- Void cheque or letter from you bank/credit union with your bank information (for direct deposit if you haven’t already set up for direct deposit with the government or are not sure if you are set up for direct deposit.)

Do you live in Ontario and are you 65+ years of age? Yes No

- If “yes”, collect your transit receipts (proof of purchase or transit usage report)

Do you have any of these documents? (check off any that you have and add a copy to your tax filing folder or envelope)

- Union dues receipt (if not included on your T4 slip)
- Medical expenses receipts
- Charitable or political donation receipts
- Disability Tax Credit Certificate (T2201)
- RRSP contribution receipts

Are you a student attending college or university? Yes No

If “yes”, print off your:

- Tuition fees receipt/T2202 form (*available in your online student account*)
- Receipt for interest paid on student loans

Did you immigrate to Canada within the last year? Yes No

If “yes”, what was the exact date of your arrival in Canada? _____

If you arrived in Canada within the last year, you may also need to know the total amount of money that you earned in your home country before you arrived in Canada last year (in Canadian dollars). If you recently arrived in Canada, let us know and we can help you decide if you need to find this information.

Are you the parent or guardian of child(ren) aged 0-19? Yes No

If “yes”,

- collect receipts for childcare expenses (e.g. daycare or camp)
- if you made or received child support payments last year, write down the total amount paid/received: _____

- list the names and birthdays (including year) of children in your custody who are 0-19 years old: _____

→ If you can't find any of your documents let us know and we can let you know how to request new copies.

→ If you have other documents you think you'll need to file your taxes, please add them to your folder/envelope.

→ **Other questions?** Ask us! [insert contact info]

Note: you are required to keep all receipts from filing your taxes for 7 years in case you are audited by the Canada Revenue Agency.