

# 2025 TAX CLINIC CHECKLIST



## ELIGIBILITY REQUIREMENTS:

Unfortunately, We cannot file a Tax return for you if:

- ☐ Your Income is greater than: \$35,000 for Individual, \$45,000 for Couples, +\$2,500 each dependent.
- ☐ You are self-employed (including independent contractors, Uber, Doordash etc – Box 20/48 on a T4A)
- ☐ You have a rental income, capital gains, or interest income greater than \$1,000
- ☐ You are filing for: Bankruptcy, or a deceased person
- ☐ You have foreign investment property worth more than \$100,000 or foreign income

**Note: Your Foreign Tax return must be done prior to arriving at Tax Clinic**

## REQUIRED DOCUMENTS:

- ☐ Proof of identity – Government issued Valid Photo ID
- ☐ Personal Information – Social Insurance number (SIN) or Individual Tax Number (ITN)
  - Prior Year tax returns/ Notice of Assessment (if not filling for the first time)

## COMMON ITEMS TO CARRY:

- ☐ T2202; Tuition Slip (for Students)
- ☐ T4; Employment Slip
- ☐ T4A; Scholarships/ Pension statement
- ☐ Rent Receipts – Either letters from landlord or cheque copies
- ☐ T4E; Employment Insurance claims

## ADDITIONAL ITEMS:

- ☐ Medical Expenses – only expenses paid out of pocket and not reimbursed by insurance
- ☐ RRSP Contribution Slips
- ☐ T5; Small Investment income Slips

## DO NOT CARRY:

- ☐ Home Expenses – Cannot be done by Clinic
- ☐ Pay Stubs – These are not Valid Substitute for T4
- ☐ GST/HST Notice of Assessments – These are not used at the Tax Clinic

