



Laurier/Conestoga 2023 Tax Clinic DOCUMENT CHECKLIST

Eligibility Requirements:

You are eligible for supports with tax filing if:

- You are a student with no income
- Your income is no greater than \$35,000 for individuals OR \$45,000 for couples plus \$2,500/dependent

We won't be able to support with tax filing if:

- You are self-employed, including independent contractors
- You are a GST/HST registrant
- You have rental income, capital gains, or interest income greater than \$1,000
- You have foreign source income
- You are filing for bankruptcy, or a deceased person
- You may be classified as a Non-Resident for Tax Purposes (please tell us if you left Canada and when during 2022)

Required Information for all Tax Returns:

- Social Insurance Number (SIN) or Individual Tax Number (ITN)
- A valid government-issued photo ID
- Income earned prior to arriving in Canada for both 2023 and 2022 (if arrival date during 2023)

Recommended Information for all Tax Returns

- Direct Deposit Information (if not already set up)
- Prior year tax return/Notice of Assessment (if not your first-time filing)

Common Items for Students

- T2202 Form - Tuition slip (Could be found on Laurier Quest/Conestoga Student Portal)
- T4 Form - Employment slip – Mailed by employer
- T4A Form - Scholarships/RESP Withdrawals/CESB/CERB
- Rent Receipts – Either letters from landlord or cheque copies (RENT RECEIPT/PROOF OF PAYMENT REQUIRED)
- T4E Form - Employment Insurance claims
- Moving Expenses – Record of expenses incurred to come to Laurier/Conestoga to study full time if your move was greater than 40 kilometers (Air, taxi, temporary accommodations and meals)
- UHIP/CIHIP Premium, other Health Insurance Premiums (RECEIPT REQUIRED)

- IF you are a newcomer to Canada in 2023 – you will need to provide your income earned prior to arriving in Canada.
- Married? Children? Please let us know EVEN if your family is not with you

Less Common Items for Students

- Medical Expenses – All expenses paid out-of-pocket and not reimbursed by insurance; includes insurance premiums
- RRSP contribution slips
- Student Loan Interest
- Charitable Donations
- T3/T5/T5007 Form - Small investment income

Foreign Investment Property

- If you have Foreign Investment Property with a cost greater than \$100,000 CDN, you must file a ***T1135 Foreign Income Verification Statement*** with CRA by April 30, 2024. **THE TAX CLINIC WILL NOT COMPLETE OR FILE THE T1135 ON YOUR BEHALF.**

If you have questions, please contact Canada Revenue Agency (“CRA”) at:

- **1-800-959-8281 for Individuals**
- **1-800-959-5525 for Businesses**

It is your responsibility to ensure that all information is complete, correct and accurate to the best of your knowledge. We will not be able to prepare your return if required information is not available.