



## Senior/Retired Person Tax Checklist

In order to better serve you, Cross Corp has created a customized checklist for you if you are senior or retired. This helps to ensure a confident and efficient filing process. By using this checklist to prepare for our meeting, we can ensure that we get the most out of our time together.

*Please note that this list is tailored for seniors or retired persons. We encourage you to make use of our free Business Buddy Chatbot on our website to get a headstart. You can ask Business Buddy questions or details about specific forms or expenses to help determine eligibility.*

### General Information:

- Copy of Your Previous Tax Return (if new client)
- Your Full Name
- Contact Information (Address, Phone Number, Email)

### Retirement Income:

- Pension Statements:
  - T4A - Statement of Pension, Retirement, Annuity, and Other Income
  - T4RIF - Statement of Income from a Registered Retirement Income Fund
  - T4A (OAS) - Statement of Old Age Security
- Canada Pension Plan (CPP) and Old Age Security (OAS) Statements
- Annuity Statements
- Investment Income Statements:
  - T5 - Statement of Investment Income
  - T3 - Statement of Trust Income Allocations and Designations
- RRSP (Registered Retirement Savings Plan) and PRPP (Pooled Registered Pension Plan) Withdrawal Statements
- Other Sources of Retirement Income

### Expenses (if applicable):

- Medical Expenses: Receipts for prescription drugs, medical services, and devices not covered by insurance.
- Charitable Donations: Receipts for charitable contributions made during the tax year.

- Homeownership Expenses: Property tax statements, mortgage interest statements.
- Seniors Tax Credits: Receipts or documents supporting eligible seniors-related tax credits.
- Other Deductible Expenses: Any other eligible expenses, such as safety deposit box fees.

#### Assets and Investments:

- Investment Statements: Statements for various investment accounts.
- Capital Gains or Losses: Records of capital gains or losses from the sale of investments.

#### Government Benefits:

- Details of any government benefits received during the tax year (GIS, OAS, etc.).

#### Tax Credits and Deductions:

- Keep records of any additional tax credits or deductions you may be eligible for.

#### Seniors-Specific Documents:

- Age Amount Certificate (if applicable)
- Pension Income Splitting Election (if applicable)

Remember, thorough documentation of your expenses is essential to maximize your eligible deductions and credits. If you have questions or need assistance, our Business Buddy Chatbot is available on our website to guide you through specific expense categories and help ensure you've covered all eligible items. We look forward to assisting you in optimizing your tax return.