



Service Industry Worker Tax Checklist

In order to better serve you, Cross Corp has created a customized checklist for your Service Industry Worker tax return, allowing you to be confident when filing your taxes. 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 people who work in the service industry (and usually make tips). 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.

Personal Information:

- First & Last Names (of all family members if required)
- Date of Birth (of all family members)
- SIN Number (of all family members above the age of 16)
- Mailing Address
- Phone Number
- Email Address
- Marriage Status
- Citizenship
- Bank Information (Optional - if you would like to sync your bank account with CRA)

Income Tax Slips - Available on CRA My Account:

- T4 Slips
 - T4 - Employment Income
 - T4 - Tips Earned (Usually not on the T4 - will be discussed in meeting)
- T4A - Statement of Pension, Retirement, Annuity, and Other Income
- T4A (OAS) - Statement of Old Age Security
- T4A (P) - Statement of Canada Pension Plan Benefits
- T4E - Statement of Employment Insurance and Other Benefits
- T4RIF - Statement of income from a Registered Retirement Income Fund
- T4RSP - Statement of RRSP Income
- T5 Slips

- T5 Statement of Investment Income - slip information for individuals
- Other Slips
 - T5007 Statement of Benefits
 - T5008 Statement of Securities Transactions - slip information for individuals
 - T5013 Statement of Partnership income
 - T5018 Statement of Contract Payments
 - T3 Statement of Trust Income Allocations and Designations – slip information for individuals
- T2202 Tuition Enrolment Certificate
- T1204 Government Services Contract Payments
- RC62 Universal Child Care Benefit statement
- RC210 Working Income Tax Benefit Advance Payments Statement
- RRSP contribution receipt – slip information for individuals
- PRPP contribution receipt – slip information for individuals
 - Expense Documentation:

Receipts and documentation for the following expenses can significantly impact your personal tax return. Be sure to bring relevant records for review during our meeting:

Employment Expenses:

- Receipts for work-related expenses such as home office expenses, supplies, and tools.
- Travel expenses related to employment.
- Uniform and special clothing expenses.

Medical Expenses:

- Receipts for eligible medical expenses, including prescription drugs, dental services, and medical devices.
- Health insurance premiums not covered by your employer.

Charitable Donations:

- Receipts for charitable contributions made during the tax year.

Education Expenses:

- Receipts for eligible education expenses, including tuition fees and textbooks.

Homeownership Expenses:

- Property tax statements.
- Mortgage interest statements.

Childcare Expenses:

- Receipts for childcare expenses, including the provider's name and SIN.

RRSP Contributions:

- Records of any additional RRSP contributions made during the tax year.
 - Tax Credits and Deductions:

Any additional documentation supporting tax credits or deductions you may be eligible for.

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 Service Industry WorkerI tax return.