

1. Laptop –OR– USB Flash Drive

Laptop

A laptop is highly recommended as we use UFile to complete clients' tax returns. This allows you to quickly file electronically on site during your appointment (if applicable).

USB Flash Drive

Our volunteers will save your tax return in a PDF for printing/paper-filing or for your own record.

2. Notice of Assessment from the previous tax year

A Notice of Assessment is a 2-page statement received by mail after the taxpayer files their tax return and the tax return is reviewed by the Canada Revenue Agency. This statement indicates the amount of tax they owe (if any), the amount of tax already paid (if any), tax credits received, and contributions to a Registered Retirement Savings Plan. If there is a refund owing, a cheque will be included with the Notice of Assessment unless the taxpayer arranged Direct Deposit. If there is an amount owing, payment information will be enclosed.

Is this your first time filing a tax return?

If this is your first time filing a tax return, you do not need to bring a Notice of Assessment.

What if you can't find it? Where can I find my Notice of Assessment?

If you have lost your Notice of Assessment, you may be able to obtain a duplicate copy of your notice of assessment or notice of reassessment on the Canada Revenue Agency website. If not, please contact the Canada Revenue Agency.

3. Tuition Amounts to Carry Forward

Tuition Amounts to Carry Forward appear on your Notice of Assessment of the previous tax year. You must claim your tuition, education, and textbook amounts first on your own return. Complete Schedule 11 to calculate how much of this credit you will need to reduce your tax payable. You may need to use all of the credit, or just some of the credit depending on how much tax you owe.

Is it your 1st year at UBC for the current tax year?

If this is your first year at UBC for the current tax year, you do not need to report your tuition amounts to carry forward.

4. Social Insurance Number (SIN) or Individual Tax Number (ITN)

Filing a tax return requires a valid SIN or an ITN.

Social Insurance Number

The Social Insurance Number (SIN) is a nine-digit number required to work in Canada or to have access to government programs and benefits. It is a requirement in order to file a tax return.

I don't have a SIN

If you are a Canadian citizen, a newcomer to Canada, or a temporary resident, you need a Social Insurance Number (SIN) to work in Canada or to receive benefits and services from government programs. To apply for a SIN, please visit Service Canada.



International Students | Individual Tax Number (ITN)

If you are an International Student without a SIN, you will need to apply for an individual tax number (ITN) by filling out the [T1261 online](#), or it can be picked up and filled out at your appointment. The ITN application can be mailed along with your Paper Tax Return to the Canada Revenue Agency. The process of getting this number may take 4-6 weeks, so please start early. Do not submit this form if you have, or are eligible to obtain, a Social Insurance Number (SIN).

5. Form T4 (Statement of Remuneration)

A T4 tax slip, or Statement of Remuneration Paid, is prepared and issued by an employer to indicate how much employment income was paid during a tax year and the amount of income tax that was deducted. Employment income includes salary, bonuses, commissions, honorariums, tips, vacation pay, taxable allowances, tips, the value of taxable benefits and payment in lieu of notice.

Employees receive 2 copies of a T4 tax slip from an employer – one to attach to your Canadian federal tax return (paper) and one to keep for records. An employee also may receive more than one T4 tax slip if employed in more than one position during the tax year.

The image shows a T4 form with the following sections and fields:

- Employer's name - Nom de l'employeur** (Line 1)
- Year - Année** (Line 2)
- Employer's account number / Numéro de compte de l'employeur** (Line 54)
- Social insurance number / Numéro d'assurance sociale** (Line 12)
- Exempt - Exemption** (Lines 28, 29)
- Province of employment / Province d'emploi** (Line 10)
- Employment code / Code d'emploi** (Line 29)
- Employee's name and address - Nom et adresse de l'employé** (Lines 13-15)
- Employment income - Revenus d'emploi** (Line 14)
- Income tax deducted - Impôt sur le revenu retenu** (Line 22)
- Employee's CPP contributions - Cotisations de l'employé au RPC** (Line 16)
- EI insurable earnings - Gains assurables d'AE** (Line 24)
- Employee's CPP contributions - Cotisations de l'employé au RRQ** (Line 17)
- CPP/QPP pensionable earnings - Gains ouvrant droit à pension - RPC/RRQ** (Line 26)
- Employee's EI premiums - Cotisations de l'employé à l'AE** (Line 18)
- Union dues - Cotisations syndicales** (Line 44)
- RPP contributions - Cotisations à un RPA** (Line 20)
- Charitable donations - Dons de bienfaisance** (Line 46)
- Pension adjustment - Facteur d'équivalence** (Line 52)
- RPP or DPSP registration number - N° d'agrement d'un RPA ou d'un RPDSB** (Line 50)
- Employee's PPIP premiums - Cotisations de l'employé au RPAP** (Line 55)
- PPIP insurable earnings - Gains assurables du RPAP** (Line 56)
- Other information** (Lines 57-59)
- Autres renseignements** (Lines 57-59)

Note: All employers are legally obligated to mail you a T4 slip by the last day of February.

6. Form T4A (Taxable Scholarship)

A T4A tax slip is a Statement of Pension, Retirement, Annuity, and Other Income. It is prepared and issued by an employer, a trustee, an estate executor or liquidator, a pension administrator, or a corporate director, to indicate how much of certain types of income they paid you during a tax year and the amount of income tax that was deducted.

Scholarships: If you have received a scholarship, you may be receiving a T4A in the mail (some do not apply) or through the UBC Student Service Centre.

[Contact UBC Enrolment Services](#)

The diagram illustrates the layout of a T4A (Taxable Scholarship) form. At the top, it features the Canada Revenue Agency logo and the title "T4A Statement of Pension, Retirement, Annuity, and Other Income". Key fields include:

- Payer's name** (Nom du payeur) and **Year** (Année).
- Payer's account number** (Numéro de compte du payeur) in box 061.
- Social insurance number** (Numéro d'assurance sociale) in box 012.
- Recipient's account number** (Numéro de compte du bénéficiaire) in box 013.
- Income categories**: Pension or superannuation (line 115), Lump-sum payments (line 130), Self-employed commissions (line 130), and Fees for services (lines 024 and 048).
- Income tax deducted** (Impôt sur le revenu retenu) in box 022.
- Other information** section with multiple boxes for reporting additional amounts.

Vertical text on the left side of the form reads: "T4A (16) Protected B when completed / Protégé B une fois rempli".

Note: If you have not received a T4A (if applicable) by the last day of February, please contact your UBC Enrolment Services Professional.

7. Form T5 (Statement of Investment Income)


A T5 is a Statement of Investment Income. A T5 is a tax information slip prepared and issued by financial institutions (banks and credit unions) which pay interest, dividends or royalties to indicate how much investment income you earned for a given tax year.

Note: If you have not received a T5 slip from an investment, please contact your bank or credit union.

8. T2202A (Tuition and Education Amounts Certificate)

T2202A (Tuition, Education, and Textbook Amounts Certificate) is a statement issued to all students who paid tuition and fees for qualifying courses that are eligible for claim on income tax returns. The form shows the amount of tuition that can be deducted for income tax purposes as well as the number of months eligible for the education and textbook deduction.

T2202A certificates are available on the [UBC Student Service Centre](#) by the last day of February for the tuition and eligible fees paid in the tax year.

	Canada Revenue Agency Agence du revenu du Canada	Tuition, education, and textbook amounts certificate Certificat pour frais de scolarité, montant relatif aux études et montant pour manuels	Protected B / Protégé B when completed / une fois rempli	T2202A (14) For student / Pour étudiant
<ul style="list-style-type: none"> Issue this certificate to a student who was enrolled during the calendar year in a qualifying educational program or a specified educational program at a post-secondary institution, such as a college or university, or at an institution certified by Employment and Social Development Canada (ESDC) (formerly Human Resources and Skills Development Canada (HRSDC)). Tuition fees paid in respect of the calendar year to any one institution have to be more than \$100. Fees paid to a post-secondary institution have to be for courses taken at the post-secondary level. Fees paid to an institution certified by ESDC have to be for courses taken to get or improve skills in an occupation, and the student has to be 16 years of age or older before the end of the year. Do not enter the cost of textbooks on this form. Students calculate the education and textbook amounts based on the number of months indicated in Box B or C below. 		<ul style="list-style-type: none"> Délivrez ce certificat à un étudiant qui était inscrit, au cours de l'année civile, à un programme de formation admissible ou à un programme de formation déterminé dans un établissement postsecondaire, comme un collège ou une université, ou dans un établissement reconnu par Emploi et Développement social Canada (EDSC) (anciennement Ressources humaines et Développement des compétences Canada (RHDC)). Les frais de scolarité payés à un établissement quelconque pour une année civile doivent dépasser 100 \$. Les frais payés à un établissement postsecondaire doivent viser des cours de niveau postsecondaire. Les frais payés à un établissement reconnu par EDSC doivent viser des cours suivis en vue d'acquies ou d'améliorer des compétences professionnelles, et l'étudiant doit avoir 16 ans ou plus avant la fin de l'année. N'inscrivez pas le coût des manuels sur ce formulaire. L'étudiant calcule les montants relatifs aux études et pour manuels d'après le nombre de mois indiqué dans les cases B ou C ci-dessous. 		
Name of program or course – Nom du programme ou du cours		Student number – Numéro d'étudiant		
Name and address of student – Nom et adresse de l'étudiant		Session periods, part-time and full-time Périodes d'études à temps partiel et à temps plein		A Eligible tuition fees, part-time and full-time sessions Frais de scolarité admissibles pour études à temps partiel et à temps plein
		From – De	To – À	Number of months for: Nombre de mois à :
Y – A	M	Y – A	M	B Part-time Temps partiel
				C Full-time Temps plein
		Totals Totaux		
		Name and address of educational institution – Nom et adresse de l'établissement d'enseignement		
Information for students: See the back of slip 1. If you want to transfer all or part of your tuition, education, and textbook amounts, complete the back of slip 2. Renseignements pour les étudiants : Lisez le verso du feuillet 1. Si vous désirez transférer une partie ou la totalité de vos frais de scolarité et de vos montants relatifs aux études et pour manuels, remplissez le verso du feuillet 2.				

9. U-Pass/Transit Tax Credit

Transit riders may be eligible for a non-refundable tax credit to help cover the cost of public transit. Riders who purchase public transit passes may be able to claim a deduction on their federal taxes for the current tax year. Transit pass holders must keep their passes in order to claim the credit. Your U-Pass Tax Credit statement can be downloaded from the [UBC Student Service Centre](#).

These passes must permit unlimited travel within Canada on:

- Local buses
- Streetcars
- Subways
- Commuter trains or buses, and
- Local ferries

You can also claim the cost of shorter duration (i.e. not U-Pass) passes if:

- Each pass entitles you to unlimited travel for an uninterrupted period of at least 5 days;
- And you purchase enough of these passes so that you are entitled to unlimited travel for at least 20 days in any 28-day period. No statement is necessary for these.

10. Tax Receipts for Charitable Donations

Donations to charities are tax deductible expenses. These donations can reduce your taxable income. Not all charitable contributions are deductible.

For official and accurate information regarding Charitable Donations, please visit the Canada Revenue Agency.