Pam Pikkert
Mortgage Broker
403-392-3094
pam@mortgagesbypam.ca
mortgagesbypam.ca

Tax Document Instructions & How to Access them on the CRA Website

The easiest way to get ALL tax documents is to contact the accountant who filed your taxes. They can quickly and easily email the documents to you. Please ensure you ask them to include all pages and schedules. Before using the following steps, please ensure you can access your CRA My Account and/or CRA My Business Account.

*** Best practice is to login on a tablet or computer, instead of on a smartphone. ***

Common PERSONAL Tax Documents

To print your **Proof of Income** Statement:
1. Login to your CRA My Account
2. From the Overview page, click Tax Returns on the left-hand side
3. Scroll down and select Proof of Income Statement from the right-hand side menu.
4. Choose the Tax Year and click Search.
5. Click Print/Save and save the file
6. Lenders require 2 years of income verification, so please repeat the steps above for the two most recent years

To print your personal **Notice of Assessment** (NOA):
1. Login to your CRA My Account
2. From the Overview page, click Tax Returns on the left-hand side
3. Select the Notice of Assessment for the required year
4. Click Print/Save and save the file as you would any other
5. Lenders require two years of income verification, so please repeat the steps above for the two most recent years

To print your **T4, T4A, T5** and more tax slips:
1. Login to your CRA My Account on a computer
2. From the Overview page, scroll down and click Tax Information Slips on the right hand side
3. Choose the Tax Year and Information Slip. Click View
4. A list of the selected slips will populate below. Click Original to view on screen
5. **IMPORTANT** – Do not click Print/Save! The CRA has a glitch in their online system which won't include your name on the slip if printed or saved from here. **INSTEAD** – Click on the three dots towards the upper right-hand corner of your browser screen. Locate Zoom In/Out
6. Zoom out until you can see the entire slip on your screen
7. Take a screenshot. (Varies by computer and operating system.)

Pam Pikkert
Mortgage Broker
403-392-3094
pam@mortgagesbypam.ca
mortgagesbypam.ca

To print your **Canada Child Benefit** (CCB) statement(s):

    1. Login to your CRA My Account

    2. From the Overview page, click Mail under correspondence on the left-hand side

    3. Find your CCB notice for the last tax year and view as a PDF

    4. Save as a PDF

To provide proof of **personal tax account balances**/**Statement of Account**:

    1. Login to your CRA My Account

    2. From the Overview page, click Accounts and Payments on the left-hand side

    3. Click Statement of Account

    4. Click Print/Save and save the file

Common CORPORATE Tax Documents

To print your FULL **Corporate Tax Return**:

    1. Login to your CRA My Business Account

    2. From the Overview Screen, select Corporate Income Tax

    3. Click the company number which is populated below

    4. Click Assessed for the tax year end required

    5. Choose Expand All

    6. Click on the three dots towards the upper right-hand corner of your browser screen and click Print, OR click CTRL+P. In the Print Screen, under Destination, choose Save As PDF

    7. Click Save

How to provide proof of **corporate tax account balances**:

    1. Login to your CRA My Business Account

    2. From the Overview Screen, select Corporate Income Tax

    3. Select View & Pay Account Balance

    4. Select View Account Transactions

    5. Under Balance Types, choose Balance

    6. Under Period End, choose All Periods

    7. Under Time Frame, choose 2 Years

    8. Click on the three dots towards the upper right-hand corner of your browser screen and click Print, OR click CTRL+P. In the Print Screen, under Destination, choose Save As PDF

    9. Click Save

★ **If you have paper copies of your documents available, please send them as as a PDF whenever possible**
- How to scan documents from a phone with Microsoft Office
- How to scan documents from a phone with Google Drive
- How to scan documents from an Iphone