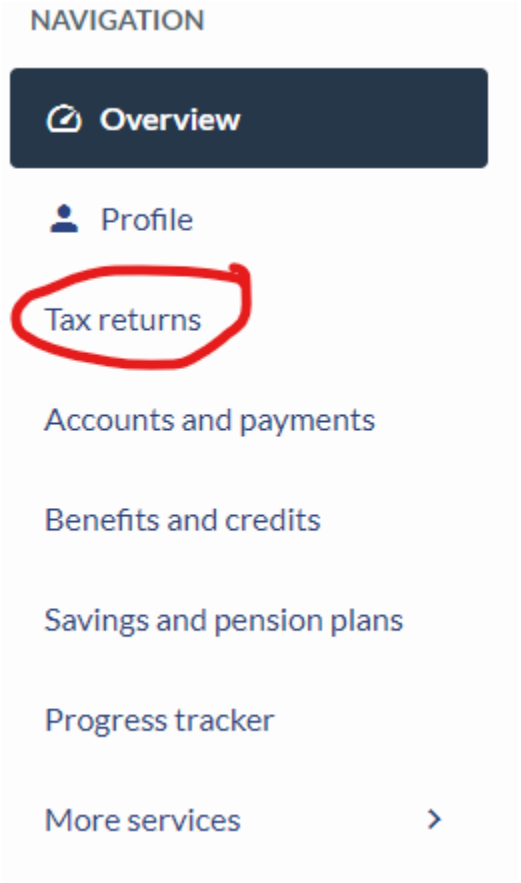
Retrieving CRA documents with a name.

Notice of assessment

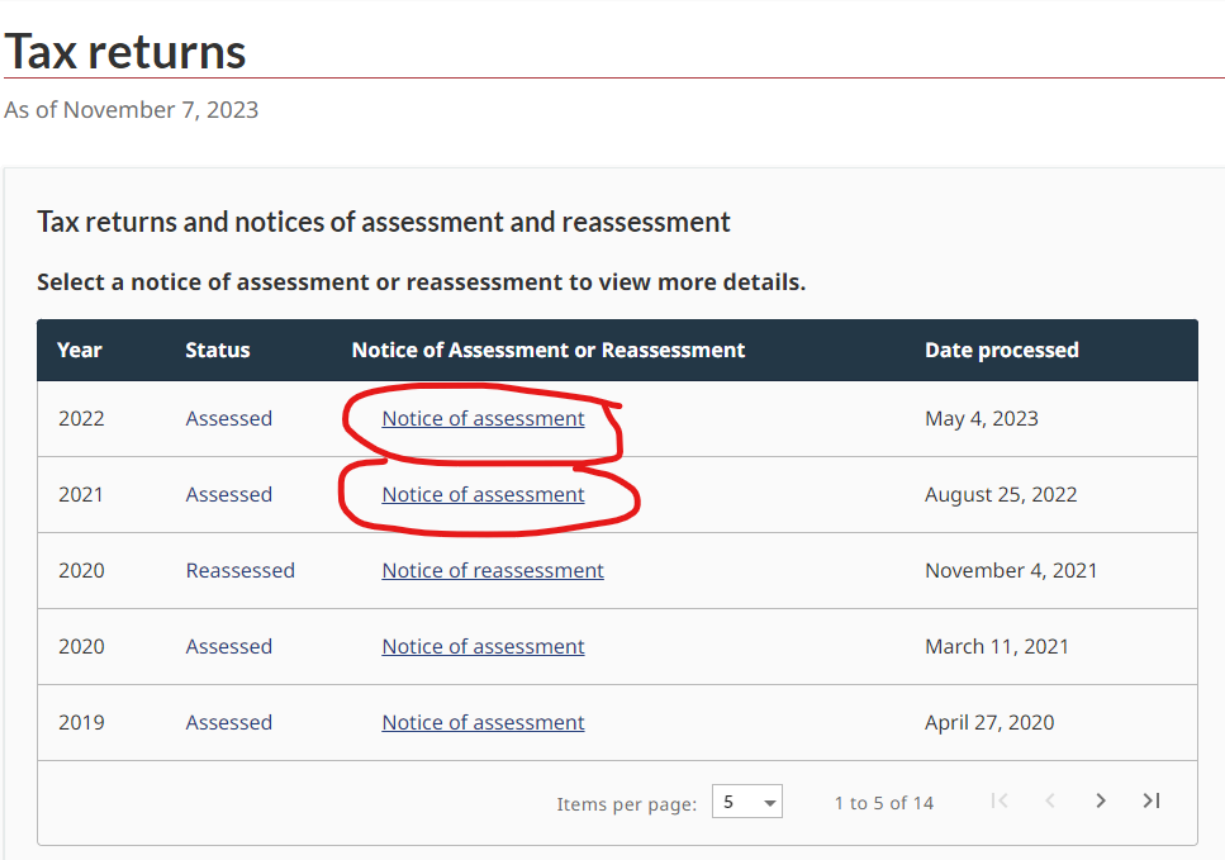
Step 1

On the left side of the screen. Click on the ‘tax returns’ button



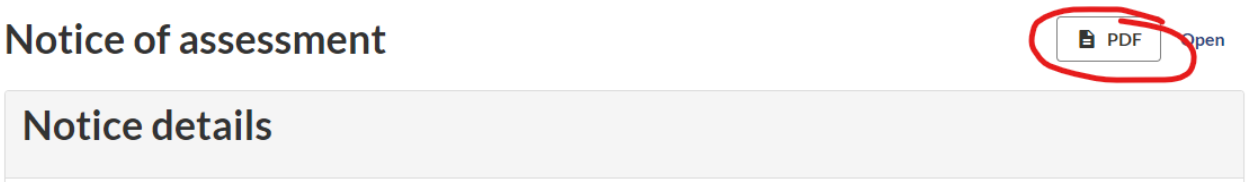
Step 2

Choose the year of assessment you’re looking for. It will be located in the middle of the page (We typically need the last 2 years)



Step 3

Choose the PDF option on the right side of the page once it opens. This will download the form to your computer.



Step 4

You'll find the PDF, typically, in your downloads folder.

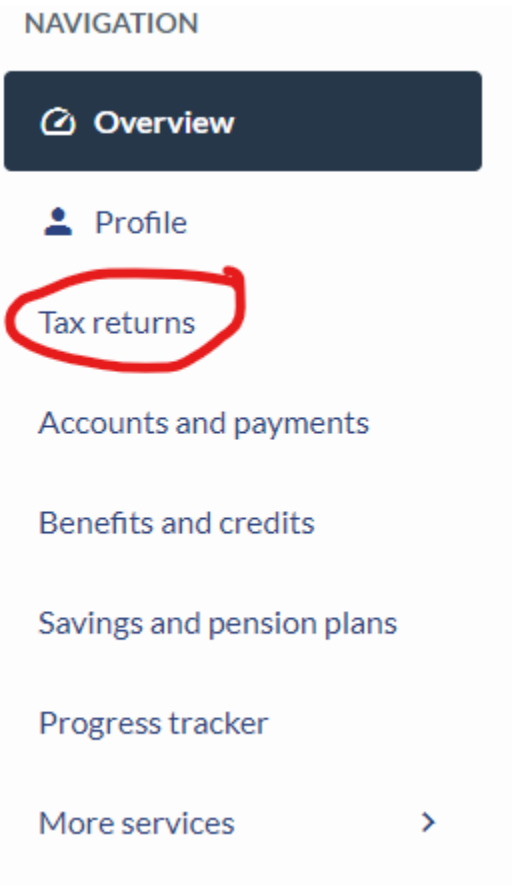
Attach that file into the portal link or into an email to us.

T4s/ T4As Etc...

YOU CANNOT GET YOUR NAME TO SHOW UP ON THE PHONE, THIS MUST BE DONE ON A COMPUTER

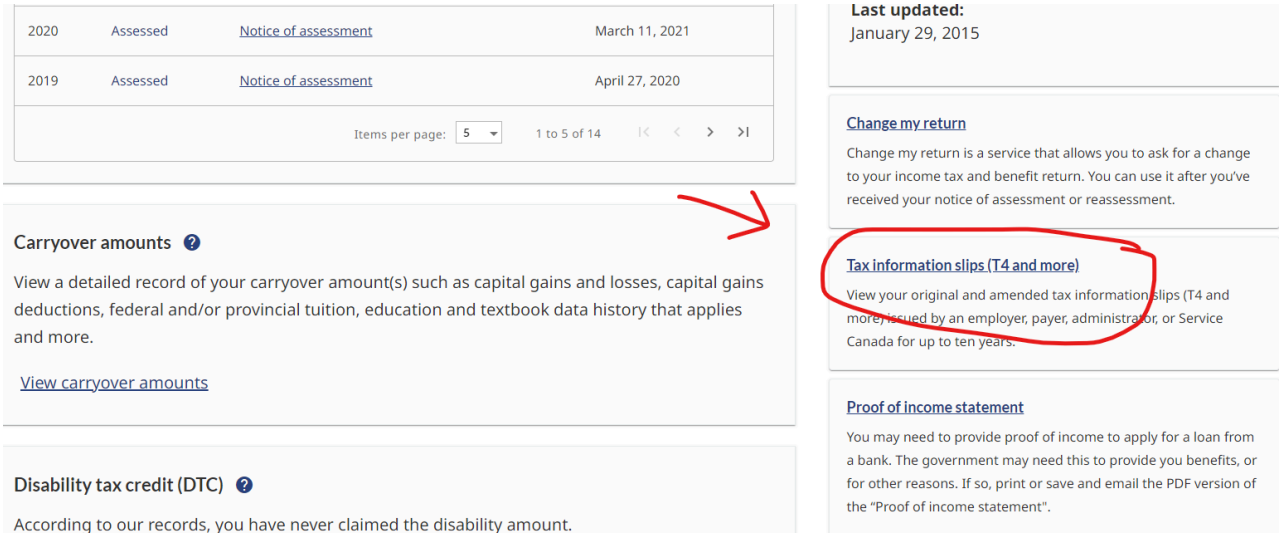
Step 1

Repeat step one from the above instructions.



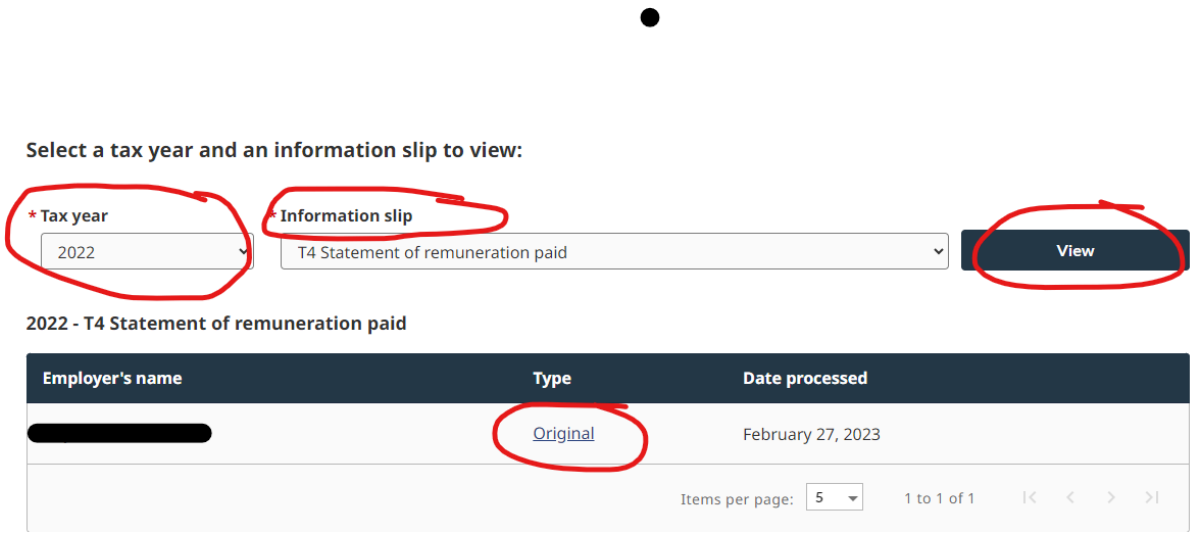
Step 2

On the right side of the screen, scroll down the page until you can see the tax information slips section



Step 3

Choose the year and type of information slip and select view. Then click the 'original' button that will pop up below.

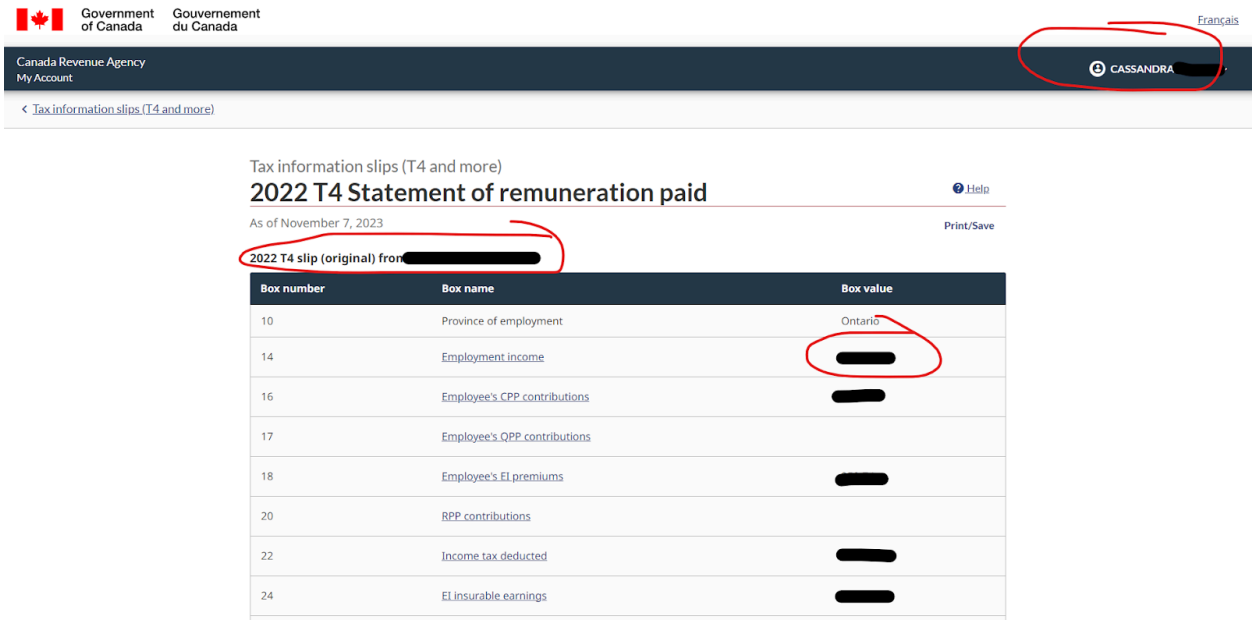


Step 4

If you just print and save this document, it will not have your name on it.

On Windows, you can use the ‘snipping tool’ to take a screenshot of the document. You can search ‘Snipping tool’ in the search bar and the icon will look like the one on the right below.

In snipping tool, you’ll select ‘New’ and drag the tool across the screen to include your employers name, your income as well as your name at the top right. (This document has been redacted for this examples purpose, please do not redact any information on your slips, the lender will not accept it)



Step 5

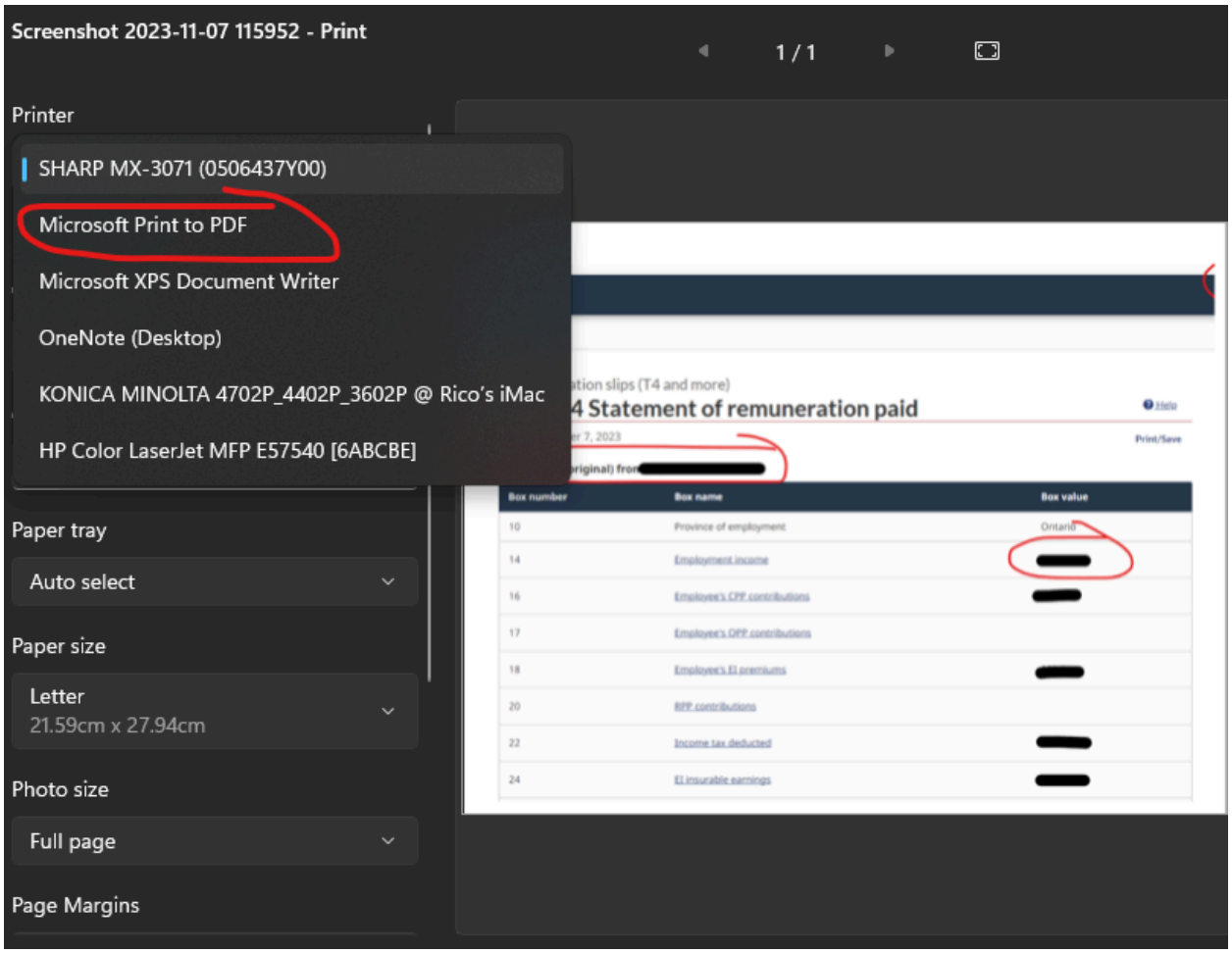
Right click the picture that has popped up in your snipping tool.

Select ‘Save as’ and save it to your computer.

Step 6

Find that photo on your computer and select print

Once the print screen pops up, change your printer to ‘Print to PDF’. Hit the ‘Print’ button and it will open up your documents folder for you to be able to save the image as a PDF file.



Step 7

Attach the PDF to the portal or as an email attachment to us.