

PERSONAL TAX CHECKLIST

Please notify us of any changes

Address

Marital status

New dependents

Income Items

- ☐ Previous year's Notice of Assessment
- ☐ All information slips (i.e. T3, T4, T4A (OAS), T4A (P), T4PS, T4E, T4RSP, T4RIF, T5, T5008)
- ☐ Investment income not reported on slips (interest, dividends, capital gains)
- ☐ Investments summary and number of Financial Advisor
- ☐ Partnership statements
- ☐ Business, professional, agricultural or rental property income and expenses
- ☐ Sale of property including stocks, bonds, and real estate (please provide details*)
- ☐ Did you receive any gratuities or tips?
- ☐ Foreign income/investments
- ☐ Spousal and child support received

*Additional information

Tax Credits

- ☐ Medical expenses (sort and add own medical receipts to reduce fees)
- ☐ Disability tax credit – form T2201
- ☐ Tuition fees – form T2202A (signed by student)
- ☐ Charitable donations
- ☐ Tax instalments (slips or details)
- ☐ Property taxes or rent paid
- ☐ Children's arts/fitness amount
- ☐ Adoption expenses
- ☐ Online news subscriptions

Deductions

- ☐ RRSP contributions
- ☐ First Home Savings Account (FHSA) contributions
- ☐ Union and/or professional dues
- ☐ Child care expenses
- ☐ Interest expense related to business or investments
- ☐ Spousal and child support payments
- ☐ Moving expenses
- ☐ Employment expenses (automobile and home office) - Please provide a signed T2200 form from your employer
- ☐ Prior year losses