PERSONAL INCOME TAX RETURN CHECKLIST

In order to properly assess your personal income tax situation, we require the following basic information or documents *(paper or electronic format)*:

- ○ Previous year Notice of Assessment from the Canada Revenue Agency *(for all parties)*
- ○ Copy of previous year Personal Income Tax Return (T1)
- ○ If not, NoA is essential, along with birth date
- ○ Annual T-Slips *(T4, T5, T3, T4OAS, T4AP, T4E, T4R etc.)*
- ○ Medical receipts and any associated travel log
- ○ Official donation receipts
- ○ Childcare receipts *(if applicable)*
- ○ RRSP contribution slips
- ○ Investment information
- ○ Professional fees/license fees/union dues
- ○ Children's birth dates *(if applicable)*
- ○ Sales of personal investments *(property, shares etc.)*
- ○ Annual property tax bill
- ○ Tuition receipts

SPECIAL CIRCUMSTANCES

For your personal business or farm return we require:

- ○ Spreadsheet with annual income and expenditures listed *(template available)*
- ○ Major asset invoices or listing from the year *(ie appliances, computer)*
- ○ Home office details and total cost of mortgage interest, property tax, insurance, utilities
- ○ Vehicle usage log *(if applicable)*
- ○ Copy of source deductions statement *(if applicable)*
- ○ Copy of HST remittances *(if applicable)*

IF YOU ARE A LANDLORD

- ○ Spreadsheet with annual income and expenditures listed *(template available)*
- ○ Major asset invoices or listing from the year *(ie tractor, computer)*
- ○ Copy of HST remittances *(if applicable)*

If you are registered with CRA for MyAccount *our business number is 771795671. Please add us as your representative to truly ensure we have not missed anything!*

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