Income Tax Preparation Checklist

--- Personal Information ---

Legal first name \_\_\_\_\_\_\_\_\_\_\_

Social Insurance Number\_\_\_\_\_\_\_\_\_\_\_

Date of birth\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dependents \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Legal last name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mailing address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Marriage status \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Notes: For all existing clients, we have your information on file. Just let us know of anything you need to update. If you are a new customer, please provide us a prior year Income Tax or Notice of Assessment.

--- Tax Slips --- (available on the CRA My Account)

T4

T5

T4RSP

T4E

T3

RC62

T4A

T4A(P)

T4A(OAS)

T4RIF

T5007

T5008

RRSP contribution slips

--- Tax Slips and Information --- (NOT available on the CRA My Account)

T2202A

Childcare expenses\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Interest expenses or management fees to earn income from investments\_\_\_\_\_

Rent or property tax if your family income is lower than $70,000\_\_\_\_\_\_\_\_\_\_\_\_\_

Medical expenses\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Donations\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Interest paid on your student loans\_\_\_\_\_

All tax slips from Revenue Quebec (RL-1, RL-8 etc.)

Others

--- Other Information ---

Did you sell or purchase a home last year?

Is this your first time filing a tax return?

Other Checklists you may need

Employment Expenses Income Tax Checklist

Rental Income Tax Preparation Checklist

Self-employed Tax Preparation Checklist

Moving Expense Tax Preparation Checklist

Corporation Income Tax Preparation Checklist

Notes: All checklists can be downloaded from our website.