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.