

TAX DOCUMENTS

Please use this checklist to ensure you have all receipts, income records, and tax documents we will need.

Name: _____ Tax Year: _____

Name of Spouse: _____

Phone: _____ Email: _____

Address/Postal Code: _____

Province of Residence on December 31: _____

Citizenship: Canadian American Other _____

Marital Status: Married Common Law Divorced Single Widow(er)

Please make note of any changes this year: _____

Dependents (children and relatives):			
Name	Birth Date	Relationship	Net Income

Do you have the following documents?

- Employment (T4)
- Pension / T4A / T4A-CPP / T4A-OAS
- Scholarships, bursaries, grants (T4A)
- Employment Insurance (T4U)
- Dividends / Interest (T5)
- RRSP, RRIF, RDSP, DPSP, RPP
- Mutual Funds | Trusts | Estates (T3)
- Partnerships | Tax Shelters (T5013)
- Other _____

Receipts for the following:

- RRSP contributions
- Union / Professional dues
- Child Care expenses
- Moving expenses
- Professional fees
- Interest paid on investments
- Tuition / Education / Textbook – Self or dependent
- Public Transit Pass
- Foreign Real Estate Property or Investments
- Disability
- Student Loan interest
- Medical / Attendant care expenses
- Charitable / Political donations
- Other _____

Documents for the following transactions:

- Real estate – sales or purchases
- Stocks / Bonds / Mutual Funds
 - Include trading summaries
- Stock Options
- Personal Property
- Labour Sponsored Funds
- Other _____

Provide details of:

- Taxable benefits not on T4
- Employment expenses (T2200)
- Trade's Person, Apprentice, Mechanic
- Child maintenance / Spousal Support
 - paid / received / agreement
- Foreign income & expenses
 - W2, 1099, K-1, 1042s
- Rental Income
- Business / Professional income
- Farming or Fishing income
- Capital gains / losses
- Do you own foreign assets that total a cost greater than \$100,000? Yes No Unsure
- Other income / expenses _____

CRA Correspondence:

- Notice of Assessments received in the year
- Income Tax Installments Paid