SHARON PERRY & ASSOCIATES | CPA

PERSONAL TAX ELECTRONIC UPLOAD
GUIDELINES & INSTRUCTIONS

WHAT TO SEND

- Completed copy of our **Personal Tax Checklist** as emailed around January 15th. (please check your spam before emailing for another copy) Add up the applicable amounts and fill in the checklist. (receipts not required)
  - Child & Spousal Support (copy of separation agreement, if new or updated amounts)
  - Childcare (fitness and arts week-long programs may apply; amount and number of weeks also needed for each program)
  - Donations (CDN registered charities only; GoFundMe type of donations not eligible)
  - Medical, Dental & Wellness (i.e. amounts not covered by health plans, health plan premiums, gluten free products for celiac, tutoring for registered learning disabilities. See CRA's A-Z list for more info)
  - Political Donations (provincial and federal amounts noted separately)
  - Union Dues (amount paid if not included on T4 already)
- Tax Slips (T3, T4, T5, RRSP, etc.)
  - Include all slip summary pages; i.e. T3 slips summary pages provide additional information needed.
  - RRSP contribution amount for the first 60 days of the new year, if slip is pending.
- Business (receipts not required)
  - Registered for GST? PST? Indicate whether we are preparing for you and if the totals include GST/PST.
  - More than one business? Complete a checklist for each one separately; do not duplicate amounts if used by each business.
  - New vehicle? Copy of your purchase/lease agreement is required. Sale of old one too, if applicable.
  - Cellphone, internet & home office: note business use percentage or "PY" for same as prior year.
- Rental Property (receipts not required)
  - New rental or sale of existing rental property? Copy of the statement of adjustments as prepared by the lawyer.
  - Is there a personal component to the property? i.e. basement suite square footage and total house square footage needed or if a vacation property, the number of days used personally.
- Employment Expenses (receipts not required)

    - Employer signed T2200 required.
    - See Business section for vehicle, cell phone, internet & home office.
- Capital Gain/Loss
    - Capital Gain/Loss and foreign property summary from investment advisor.
    - Management fees statement or amount paid. (RRSP & TFSA N/A)
- Sale of Principal Residence (PR)
    - Year purchased, purchase price, sale amount and ownership (i.e. 50/50 with spouse)
    - If a rental property for some of the years, statement of adjustments for the purchase and sale required plus the years it was your PR.

BEFORE YOU SEND

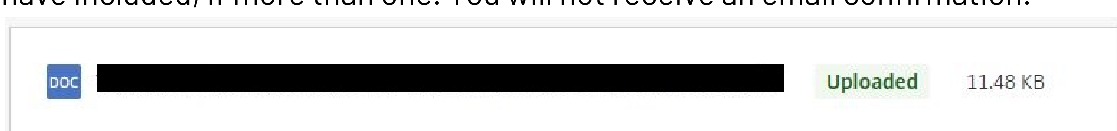
- Please double check your documents to ensure they are of high quality and resolution.
    - [ ] Check that double sided pages are both included.
    - [ ] Confirm no missing pages or pages cut-off.
    - [ ] When zooming in, numbers and letters should be legible. Always upload using full size.
    - [ ] Password protected pages should have passwords turned off or provide the password separately by email.
    - [ ] All documents scanned should be in one folder and preferably as one complete PDF document. Please *do not* send different types of tax documents in separate folders.
    - [ ] Double check the totals provided for any typos or transcription errors.
    - [ ] If you receive T3 slips, ensure you have received all before uploading.

HOW TO SEND

- Take a picture or scan all relevant information.
- Upload as one complete file to our secure site (link also found in our email signatures) or send as a JPEG or PDF by email.
- <u>Note:</u> For security reasons, we are not able to download via Google Drive, Dropbox, or any other online platforms.

AFTER YOU SEND

- Submitting through our secure site, the screen will show "Uploaded" next to each file you have included, if more than one. You will not receive an email confirmation.



- Upon receipt of your payment/retainer, we will proceed and will be in touch by email or phone, if any questions. If you do not hear from us within 7 business days, please call. Make sure you keep all receipts in a safe location for CRA audit purposes.