



PERSONAL INCOME TAX CHECKLIST

(NEW CLIENTS ONLY)

PERSONAL INFORMATION

- Name, Address, Birthdate, SIN - You
- Name, Address, Birthdate, SIN - Spouse/Common Law Partner
- Name, Address, Birthdate, SIN - Children

PRIOR YEAR INFORMATION

- Copy of your **LAST** tax return
- Copy of your **LAST** Notice of Assessment

TAX SLIPS & OFFICIAL RECEIPTS

- | | |
|---|---|
| <input type="checkbox"/> T3, T4, T5 & All Other T-Slips | <input type="checkbox"/> Child & Spousal Support Paid/Received |
| <input type="checkbox"/> Rental Property | <input type="checkbox"/> Investment Management/Broker Fees |
| <input type="checkbox"/> Sole Proprietor | <input type="checkbox"/> Interest Paid On Loans (Non-Registered Investments Only) |
| <input type="checkbox"/> Capital Gain (Loss) Summary | <input type="checkbox"/> Employment Expenses (include T2200 from employer) |
| <input type="checkbox"/> Sale Of Principal Residence Or Rental Property | <input type="checkbox"/> Legal Expenses To Collect Alimony, Pension Or Retiring Allowances |
| <input type="checkbox"/> RRSP Contributions | <input type="checkbox"/> Tuition Fees (T2202) |
| <input type="checkbox"/> Union & Professional Dues | <input type="checkbox"/> Medical, Dental & Health Practitioners (including premiums paid for extended benefits) |
| <input type="checkbox"/> Child Care | <input type="checkbox"/> Attendant Care Expenses |
| <input type="checkbox"/> Moving Expenses (if you moved 40+Kms for a new job or work location, school or new business) | <input type="checkbox"/> Charitable & Political Donations |

*SEE [T1 UPLOAD INTRUCTIONS](#) FOR MORE DETAILS.