

Personal Tax Checklist

Please provide us with any of the following items applicable to your situation for the tax year that you would like us to file for you:

- Your legal name, date of birth, address, and phone number
- Your spouse or common-law partner's name, date of birth, and SIN number
- Dependent children – names and dates of birth
- All T4 slips for employers
- All other income slips (T3, T5, T4E, T4A, T4A(P), T4A(OAS), T4RSP, T4RIF)
- Charitable / political donations receipts
- Investment receipts (share buy and sell, along with statement)
- RRSP contribution receipts
- Medical receipts (pharmacy, chiropractic, natural healing, dental, eye glasses, etc.) for the family
- Public transit passes
- Childcare (nanny, daycare, school noon supervision receipts)
- Child support payments or alimony payments
- Tuition receipts, interest paid on student loans
- Rental property information (see separate checklist)
- Moving expenses (moving company, hotels, meals, legal/realtor fees)
- Declaration of Conditions of Employment (T2200) and receipts for work expenses if you are not reimbursed for them
- Old Age Security and CPP benefits and other pensions and annuities
- EI benefits, Workers' Compensation benefits, or social assistance payments
- Notice of Assessment for the last tax year filed and a copy of your tax filing for the previous year
- Any other tax-related correspondence from the government for the current year