Tax Checklist

Below is a general guideline of information we suggest you bring in when having your return prepared. If you have information in addition to what is listed here that you feel is important please bring that in as well.

- Prior year's tax returns (new clients only)
- Prior year notice of assessment (new clients only)
- All personal information (SIN's of all family members, address, dates of birth, marital status, dependents etc.)
- T4 for employment income
- Tips/Gratuities
- T3 for trust and dividend income
- T5 for investment income
- Pension income (OAS, CPP, T4A, T4RIF, Social Security, US & foreign pensions etc)
- Gains/Loss report from bank or financial advisor
- RRSP withdrawals
- RRSP contributions
- Charitable donations
- Rent or property tax receipts
- Medical expenses (please organize these)
- T2202 forms for tuition
- Student loan interest
- Child care payments
- Interest and carrying charges paid to earn investment income
- T2200 or TL2 for employment expenses
- Moving expenses if you moved more than 40km closer to your place of work – see worksheet
- Spousal and child support payments made or received
- If you have a business, rental, or claim employment expenses please complete the worksheet in the "files" section of the website and bring that in with your information