

Tax Checklist

Has any of the following information changed?

Phone number

Marital status (include date)

Address

New baby (include name, birthdate, SIN)

Did you sell your principal residence?

Purchase Year: _____

Sale Price: _____

(complete sale of property worksheet)

Do you have dependent children?

- New baby
- Childcare receipts
- Post secondary tuition (T2202 from school website)

Do you have employment income?

- T4 (Canadian employment)
- W2 (US employment)
- Business income: complete business worksheet available on our website

Do you have other income?

- Tips/gratuities
- Rental property (complete worksheet)
- Solar panel

Are you collecting any pension income?

- OAS - Social Security
- CPP - US / other foreign pensions
- T4A - Etc.
- T4RIF

Did you purchase or withdraw from your RRSPs?

- RRSP contribution receipts/amounts
- T4RSP for withdrawals

Do you have investment income/collect interest?

- T3 for trust and dividend income
- T5 for interest and investment income
- T5008 or Realized gains/loss report from financial advisor or bank
- Interest and carrying charges paid to earn investment income

Do you have employment expenses?

- T2200 or TL2 from employer is required
- Complete worksheet from our website

Education expenses

- T2202 for tuition receipt (found on school account website under income tax)
- Student loan interest

Did you have medical expenses?

- Please include itemized list or organize receipts

Did you receive or make any spousal or child support payments?

- Include yearly totals

Did you make charitable or political contributions?

- Please include itemized list or organize receipts

Do you pay rent or property taxes?

- Please include amounts for potential government benefit