

TAX DOCUMENTS

Please use this checklist to ensure you have all receipts, income records, and tax documents.

NAME: _____ TAX YEAR: _____

NAME OF SPOUSE: _____

PHONE: _____ EMAIL: _____

ADDRESS/POSTAL CODE: _____

PROVINCE OF RESIDENCE ON DECEMBER 31: _____

CITIZENSHIP: CANADIAN AMERICAN OTHER _____

MARITAL STATUS: MARRIED COMMON LAW DIVORCED SINGLE WIDOW(ER)

PLEASE MAKE NOTE OF ANY CHANGES THIS YEAR – ADDRESS, PHONE, EMAIL, FIRST-TIME HOME BUYER, BIRTHS, DEATHS, MARITAL STATUS _____

DEPENDENTS (CHILDREN AND RELATIVES):			
NAME	BIRTH DATE	RELATIONSHIP	NET INCOME

Do you have the following documents?

- Dividends / Interest (T5)
- Employment (T4)
- Employment Insurance (T4E)
- Mutual Funds / Trusts / Estates (T3)
- Partnerships / Tax Shelters (T5013)
- Pension / T4A / T4A–CPP / T4A–OAS
- RRSP, RRIIF, RDSP, DPSP, RPP
- Scholarships, Bursaries, Grants (T4A)
- Other _____

Receipts for the following:

- Charitable / Political Donations
- Child Care Expenses
- Digital News Subscription Receipts
- Disability
- Foreign Real Estate Property or Investments
- Interest Paid on Investments
- Medical / Attendant Care Expenses
- Moving Expenses
- Professional Fees
- RRSP Contributions
- Student Loan Interest
- Tuition Self or Dependent
- Union / Professional Dues
- Other _____

Documents for the following transactions:

- Labour Sponsored Funds
- Personal Property
- Real Estate – Sales or Purchases
- Stocks / Bonds / Mutual Funds – Include Trading Summaries
- Stock Options
- Other _____

Provide details of:

- Business / Professional Income
- Capital Gains / Losses
- Child / Spousal Support Agreement (Paid or Received)
- Cryptocurrency Holdings (Include **All** Details)
- Employment Expenses (T2200)
- Farming or Fishing Income
- Foreign Assets that total a cost greater than \$100,000? Yes No Unsure
- Foreign Income & Expenses – W2, 1099, K-1, 1042s
- Home Renovations
- Rental **Expense** (for the BC Renter's Tax Credit)
- Rental Income
- Taxable Benefits not on T4
- Trade's Person, Apprentice, Mechanic Expenses
- Other Income / Expenses _____

CRA Correspondence:

- Income Tax Instalments Paid
- Notice of Assessments Received in the Year