

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?

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

Receipts for the following:

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

Documents for the following transactions:

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

Provide details of:

- All Real Estate and Financial Accounts that you are listed and/or named in any way on behalf of someone else
- All details of Cryptocurrency Holdings
- Taxable Benefits not on T4
- Employment Expenses (T2200)
- Trade’s Person, Apprentice, Mechanic Expenses
- Child / Spousal Support Agreement (*Paid or Received*)
- Foreign Income & Expenses – *W2, 1099, K-1, 1042s*
- Rental Income
- Business / Professional Income
- Farming or Fishing Income
- Capital Gains / Losses
- Do you own foreign assets that total a cost greater than \$100,000? Yes No Unsure
- Other Income / Expenses _____

CRA Correspondence:

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