



TAX RETURN INFORMATION & DOCUMENT CHECKLIST

Client Name: _____ Tax Year: _____

Prepared by: _____ Date Received: _____

1. CRA INFORMATION

- Do you have a CRA My Account? ☐ Yes ☐ No

If no, would you like assistance setting one up? ☐ Yes ☐ No

- Do you authorize Huron Tax Consultants to access your CRA online account? ☐ Yes ☐ No

If yes, we will guide you through the authorization process.

☐ CRA authorization completed

2. PERSONAL INFORMATION CHANGES

Please indicate if any of the following occurred during the tax year.

☐ Married or became common-law (when?)

☐ Separated or divorced (when?)

☐ Birth or adoption of a child – please fill out section 3

☐ Death of spouse or dependant (when?)

☐ Moved – new address required

☐ Purchased a house*

☐ Sold a house*

☐ Purchased rental property*

☐ Sold rental property*

☐ Started a business

☐ Closed a business

☐ Started farming

☐ Stopped farming

☐ Became a resident of Canada (for tax purposes)

☐ Left Canada (stopped being a resident of Canada for tax purposes)

☐ Parent or relative moved in with you for care

☐ None of the above

Additional details:

*If you purchased or sold a house, rental property or any property, please provide:

☐ Statement of adjustments

☐ Lawyer's invoice showing fees and disbursements paid on closing

**3. FAMILY INFORMATION**

- Did you have a new child or dependant during the year? ☐ Yes ☐ No

Full name: _____

Date of birth: _____ SIN: _____

- Did you have adoption expenses?

☐ Agency fees

☐ Travel expenses

☐ Immigration expenses

4. INCOME INFORMATION & SUPPORTING DOCUMENTS

Please check all sources of income that apply and provide the related documents.

Income Type	Applies	Documents Provided
Employment income	☐	☐ T4
Self-employment income	☐	☐ Business records
Farming income	☐	☐ Farm records
Rental income	☐	☐ Rental records
Trust income	☐	☐ T3
Pension, retirement, severance income	☐	☐ T4A
CPP benefits	☐	☐ T4A(P)
Old Age Security	☐	☐ T4A(OAS)
Employment Insurance	☐	☐ T4E
Investment income	☐	☐ T5
Securities transactions	☐	☐ T5008
Capital gains/losses	☐	☐ Supporting documents
Interest income	☐	☐ Supporting documents
Dividend income	☐	☐ Supporting documents
Workers' Compensation/social assistance	☐	☐ T5007
Foreign income	☐	☐ Supporting documents
Cryptocurrency transactions	☐	☐ Supporting documents
Other	☐	

**5. DEDUCTIONS, CREDITS & SUPPORTING DOCUMENTS**

Please check all that apply and provide supporting documents.

Deduction/Credit	Applies	Documents provided
RRSP/RRIF contributions	☐	☐ RRSP receipts
RRSP/RRIF withdrawals	☐	☐ Supporting documents
Home Buyers' Plan (RRSP used for home purchase)	☐	☐ Supporting documents
FHSA contributions/withdrawals	☐	☐ FHSA statement
Tuition or Interest portion on repayment of student loans	☐	☐ T2202 (issued by your college or university)
Student loan interest	☐	☐ Statement
Medical expenses	☐	☐ Receipts/statements
Charitable donations	☐	☐ Receipts
Political contributions	☐	☐ Receipts
Union dues	☐	☐ Receipts/slips
Professional dues	☐	☐ Receipts/slips
Childcare expenses	☐	☐ Receipts
Disability Tax Credit	☐	☐ Supporting documents
Caregiver credits	☐	☐ Supporting documents
Spousal support paid	☐	☐ Supporting documents
Spousal support received	☐	☐ Supporting documents
Property taxes	☐	☐ Tax bill
Rent paid	☐	☐ Rent receipts
Volunteer firefighter credit	☐	☐ Supporting documents
Employment expenses	☐	☐ T2200 (signed by you and your employer)
Home office expenses	☐	☐ Expense details
Vehicle expenses	☐	☐ Mileage log/receipts
Moving expenses	☐	☐ Receipts
Other	☐	



6. BUSINESS-RELATED INFORMATION (Includes sole proprietorships and partnerships)

If applicable, provide the following:

- | | |
|---|--|
| ☐ Total income | ☐ Home utility bills (business-use portion) |
| ☐ Expense receipts | ☐ Telephone and internet bills (business-use portion) |
| ☐ Financial statements | ☐ Home office expenses |
| ☐ Mileage log | ☐ Rental income and expense records |
| ☐ Vehicle expenses | |
| ☐ Gas receipts | |

7. ADDITIONAL QUESTIONS

- Did you pay income tax installments during the year? ☐ Yes ☐ No

If yes, provide dates and amounts:

- Did you work from home during the year? ☐ Yes ☐ No

- Are you over 65 and electing pension splitting? ☐ Yes ☐ No

- Do you have dual citizenship with Canada and the United States? ☐ Yes ☐ No

- Did you receive income from another country? ☐ Yes ☐ No

- Were you a first-time home buyer? ☐ Yes ☐ No

- Other information we should be aware of:

8. CLIENT REFERRAL INFORMATION

How did you hear about us?

- | | |
|--|--|
| ☐ Existing client | ☐ Website |
| ☐ Family/Friend | ☐ Community event |
| ☐ Google | ☐ Other: _____ |
| ☐ Facebook | |

NOTES / TAX PREPARER COMMENTS