

Income Tax Preparation Checklist

--- Personal Information ---

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|--|--|
| <input type="checkbox"/> Legal first name _____ | <input type="checkbox"/> Legal last name _____ |
| <input type="checkbox"/> Social Insurance Number _____ | <input type="checkbox"/> Mailing address _____ |
| <input type="checkbox"/> Date of birth _____ | <input type="checkbox"/> Marriage status _____ |
| <input type="checkbox"/> Spouse _____ | |
| <input type="checkbox"/> Dependents _____ | |

Notes: For all existing clients, we have your information on file. Just let us know of anything you need to update.

--- Tax Slips --- (available on the CRA My Account)

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|--------------------------------|-----------------------------------|---|
| <input type="checkbox"/> T4 | <input type="checkbox"/> RC62 | <input type="checkbox"/> T5007 |
| <input type="checkbox"/> T5 | <input type="checkbox"/> T4A | <input type="checkbox"/> T5008 |
| <input type="checkbox"/> T4RSP | <input type="checkbox"/> T4A(P) | <input type="checkbox"/> RRSP contribution slip |
| <input type="checkbox"/> T4E | <input type="checkbox"/> T4A(OAS) | |
| <input type="checkbox"/> T3 | <input type="checkbox"/> T4RIF | |

Notes: You can authorize us to get above slips from the CRA online service My Account. However, it is possible there are missing or incorrect slips. Therefore, we are still encouraging you bring all your tax slips while preparing your tax return.

--- Tax Slips and Information --- (NOT available on the CRA My Account)

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| <input type="checkbox"/> T2202A | <input type="checkbox"/> Medical expenses _____ |
| <input type="checkbox"/> Childcare expenses _____ | <input type="checkbox"/> Donations _____ |
| <input type="checkbox"/> Interest expenses or management fees to earn income from investments _____ | <input type="checkbox"/> Interest paid on your student loans _____ |
| <input type="checkbox"/> Rent or property tax if your family income is lower than \$70,000 _____ | <input type="checkbox"/> All tax slips from Revenue Quebec (RL-1, RL-8 etc.) |
| | <input type="checkbox"/> Others |

--- Other Information ---

- | | |
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| <input type="checkbox"/> Did you sell or purchase a home last year? | <input type="checkbox"/> Is this your first time filing a tax return? |
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Other Checklists you may need

- | | |
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| <input type="checkbox"/> Employment Expenses Income Tax Checklist | <input type="checkbox"/> Moving Expense Tax Preparation Checklist |
| <input type="checkbox"/> Rental Income Tax Preparation Checklist | <input type="checkbox"/> Corporation Income Tax Preparation Checklist |
| <input type="checkbox"/> Self-employed Tax Preparation Checklist | |

Notes: All checklists are available on our website