



INDIVIDUAL TAX CHECKLIST

Employed / General

Check off everything that applies, gather those documents, and send them to us.

Tell us if this year you married, separated, had a baby, bought or sold a home, moved, or started a business.

A ABOUT YOU

- Social Insurance Number (SIN)
- Full legal name, date of birth, address & postal code
- Marital status (and date of any change this year)
- Spouse / common-law partner: name, SIN, DOB, net income
- Dependants: names, dates of birth, net income (if any)
- Direct deposit: void cheque OR account / transit / institution number
- Last year's Notice of Assessment (new clients)
- Any CRA letters or correspondence received this year

B INCOME SLIPS – all you received

- T4 – employment income (one per employer)
- T4A – pension, annuities, scholarships, other income
- T4E – Employment Insurance (EI) benefits
- T4A(OAS) / T4A(P) – Old Age Security / CPP
- T4RSP / T4RIF – RRSP / RRIF withdrawals
- T5 – interest, dividends, investment income
- T3 – trust or mutual-fund income
- T5007 – social assistance / workers' compensation
- T4FHSA – First Home Savings Account activity
- Tips, cash, or other income not on a slip

C DEDUCTIONS & CREDITS – keep receipts

- RRSP contributions (this year + first 60 days of next year)
- FHSA / TFSA contribution records
- Medical expenses (prescriptions, dental, etc.)
- Charitable & political donation receipts
- Childcare expense receipts
- T2202 – tuition (yours, or transferred from spouse/child)
- Employment expenses + signed T2200 (if employer requires)
- Union or professional dues (if not on your T4)
- Disability Tax Credit (T2201) – you or a dependant
- Support payments made or received (with written agreement)
- Rent or property tax paid – for provincial credits (if eligible)
- Home Buyers' Amount – first home purchased this year
- Sale of principal residence (date, proceeds, original cost)
- Moving expenses (moved 40 km+ closer for work)

D SIGN & RETURN – we send these to you

- Individual Tax Interview Form – completed & signed
- Privacy Policy – signed
- Authorization Form (AUT-01) – signed, lets us file for you