



NEWCOMER TAX CHECKLIST

First Tax Return in Canada

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

Your date of entry to Canada sets how the year is prorated – tell us when you became a resident.

A ABOUT YOU

Social Insurance Number (SIN) – or ITN if not yet eligible
Full legal name, date of birth, address & postal code
Date you entered Canada (residency start date)
Immigration documents (PR card, COPR, study or work permit)
Marital status; spouse name, DOB & net income
Dependants: names, dates of birth
Direct deposit: void cheque OR account / transit / institution number

B INCOME – Canadian & foreign

T4 – Canadian employment income
T4A / T5 / T3 – other Canadian income slips
Foreign income before you arrived (employment, business)
Foreign income after you arrived (must be reported)
World income amount (you and spouse) for benefit calculations

C CREDITS, BENEFITS & RECEIPTS

RC151 – GST/HST credit application (first year)
RC66 – Canada Child Benefit application (if you have children)
T2202 – tuition, if you studied in Canada
Medical, childcare & charitable donation receipts
FHSA / TFSA / RRSP contribution records
Rent or property tax paid – for provincial credits (if eligible)
Foreign property over \$100k CAD – usually not required your first year

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