

DOCUMENTS REQUIRED FOR INCOME TAX PREPARATION

- Notice of Assessment (last year's return)
- Copy of last year's Income Tax Return (new clients only)
- Any correspondence from the Canada Revenue Agency (CRA)
- Employment Slips (T4, T3, T5, T4A, T4E, T4RSP, Old Age Security & CPP Benefits)
- Employment Insurance benefits
- Social Assistance payments
- Worker's Compensation benefits
- COVID 19 benefits

Receipts: (Please calculate totals)

- RRSP contributions (including first 60 days of this year)
- Medical expenses
- Charitable donations
- Children's Fitness programs
- Child Care expenses
- Professional fees or dues
- Tuition/Education amounts for qualifying students (T2202A)
- Sale of deemed sale of stocks, bonds or real estate
- Support for a child, spouse/common-law partner
- Tool expenses (tradesperson)
- Political contributions
- Adoption expenses
- Moving expenses
- Interest paid on student loans
- Carrying charges and interest expenses

Other: (Please calculate totals)

- Work from home (COVID 19)
- Property Tax statement
- Rent receipts/amounts
- Declaration of Conditions of Employment (T2200)
- Disability Tax Credit Certificate (T2201)
- Business/professional income & expenses records
- Rental income & expenses records