



Personal Tax Checklist

Please notify us of any of the following changes:

Change of Address
Change in Marital Status
Additional Dependents

Income items

Previous year's Notice of Assessment
All information slips (e.g. T3, T4, T4A (OAS), T4A (P), T4E, T4RSP, T4RIF, T5, T5008)
Investment income not on slips (Interest, Dividends, Capital Gains)
Partnership statements
Business, Professional, Agricultural or Rental Property income and expenses
Sale of property including stocks, bonds, and real estate - Please provide details

Deductions

RRSP contributions
Union and Professional Dues
Childcare Expenses
Interest expense related to business or investments
Safety Deposit Box
Alimony or Child Support
Moving Expenses
Employment Expenses (Automobile and Home Office) - Please provide a signed T2200 form
Prior Year Losses

Tax Credits

Medical expenses
Disability
Tuition Fees—Form T2202A signed by student
Charitable donations
Tax installments—slips or details
Property taxes or rent paid