Income Tax Preparation Checklist

--- Personal Information ---

[ ]  Legal first name \_\_\_\_\_\_\_\_\_\_\_

[ ]  Social Insurance Number\_\_\_\_\_\_\_\_\_\_\_

[ ]  Date of birth\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Spouse \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Dependents \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Legal last name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Mailing address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Marriage status \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*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)

[ ]  T4

[ ]  T5

[ ]  T4RSP

[ ]  T4E

[ ]  T3

[ ]  RC62

[ ]  T4A

[ ]  T4A(P)

[ ]  T4A(OAS)

[ ]  T4RIF

[ ]  T5007

[ ]  T5008

[ ]  RRSP contribution slip

***Notes****: You can authorize us to retrieve the above slips from the CRA online service. However, there may be missing or incorrect slips. Therefore, we still encourage you to obtain all your tax slips while preparing your tax return.*

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

[ ]  License fees

[ ]  Childcare expenses\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Interest expenses or management fees to earn income from investments\_\_\_\_\_

[ ]  Rent or property tax if your family income is lower than $70,000\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Medical expenses\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Donations\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Interest paid on your student loans\_\_\_\_\_

[ ]  All tax slips from Revenue Quebec (RL-1, RL-8 etc.)

[ ]  Others

--- Other Information ---

[ ]  Did you sell or purchase a home last year?

[ ]  Is this your first time filing a tax return?

****Other Checklists you may need****

[ ]  Employment Expenses Income Tax Checklist

[ ]  Rental Income Tax Preparation Checklist

[ ]  Self-employed Tax Preparation Checklist

[ ]  Moving Expense Tax Preparation Checklist

[ ]  Corporation Income Tax Preparation Checklist

*Notes: All checklists can be downloaded from our website Solidtax.ca.*