

PERSONAL TAX CHECKLIST

CLIENT INFORMATION

Taxpayer Name: _____

Spouse name: _____

Date of Birth: _____

Spouse Date of Birth: _____

Marital Status: Single Married Widowed

Occupation: _____

Occupation: _____

Address (if different): _____

Address: _____

Phone number: _____

Phone number: _____

Email: _____

Email: _____

DEPENDENTS (or person living in your household)

Name	Relationship	Date of Birth	Full Time Student	Disabled

SLIPS

- T4 – Employment income
- T4E – Employment insurance benefits
- T3, T5, T5008 – Interest, dividends, mutual funds
- T2202A – Tuition / education receipts
- RC62 – Universal Child Care Benefit
- T4A-OAS, T4AP – Old Age Security and CPP benefits
- T4A – Other pensions and annuities
- T5007 – Social assistance payments
- T5007 – Workers’ compensation benefits
- T2200 – Declaration of Conditions of Employment

RECEIPTS

- RRSP contribution receipts
- Support for a child, spouse or common-law
- Professional or union dues
- Tool expenses (tradespersons & apprentice)
- Medical expenses
- Transit pass receipts
- Charitable donations
- Child care expenses
- Interest paid on student loans
- Exams for professional certification
- Moving expenses

OTHER DOCUMENTATION

- Notice of Assessment/Reassessment
- Canada Revenue Agency correspondence
- Rental income and expense receipts
- Disability Tax Credit Certificate
- Custody Arrangement documentation
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