



## BE PREPARED

# Tax Preparation Document Checklist

Gather these documents before your appointment. Don't worry if you're missing something — we'll guide you through it.

### Basic Information

- Full legal name
- Date of birth
- Current address
- Social Insurance Number
- Phone number and email address

### Family Information (if applicable)

- Spouse's name, SIN, and date of birth
- Names and dates of birth of any dependents

### Income Slips

- T4 – Employment income
- T4A – Pension, contract, or other income
- T5 – Investment income
- T3 – Trust income
- T4RSP or T4RIF
- T5008 – Investment sales
- Any other tax slips received

### Additional Income (if applicable)

- Self-employment or contract income
- Rental income
- Investment or cryptocurrency trading
- Foreign income

## **Deductions and Credits** (if applicable)

- RRSP contribution receipts
- Tuition slips (T2202)
- Medical expenses
- Charitable donation receipts
- Childcare expense receipts
- Union or professional dues
- Moving expenses
- Home office expenses (if self-employed)

## **Other Information**

- Your most recent CRA Notice of Assessment
- Direct deposit information with CRA (if not already set up)
- Details of any major life changes during the year (marriage, separation, new child, moving provinces, etc.)