



Things to Get Personal List

- Copies of my personal tax returns (T1's) for years _____ and _____
- Assessment notices from CRA for the above years
- All correspondence with CRA due to audit(s)
- Completed Business Revenue and Expense forms for the year
Including In-home office expenses, auto expenses and capital asset purchases or sales
- Copies of personal GST return(s) filed from _____ to _____
- Blank GST returns that need to be completed and filed
- T4's (from your job or business)
- T5's (from investment type income)
- T3's (from trusts)
- All other slips received from the government or from businesses or companies
- Rental Property information including all rents received and all expenses incurred
- All information regarding Capital Gains (from sale of shares in a company or sale of any asset that produces a capital gain)
- RRSP income received (T4RSP) slips
- Amounts received for any other type of income
- Amounts received from WCB (from slip provided)
- RRSP receipts
- Union or Professional Dues receipt
- Summary of Child Care Expenses
- Attendant care expenses
- Moving expenses summary (on form attached if required)
- Support payments paid or received (alimony/child support)
- Carrying Charges expenses amount (amounts paid for safety deposit box fees and or interest paid to earn investment income)
- Information for Northern Residents Deduction (on form attached if required)
- Information for Dependants
Name _____ Relationship _____ Net Income _____
Birthday of dependent ____/____/____ Disability? Y / N Social Assistance received? Y / N
- Medical Expenses (Totaled) \$ _____
- Charitable Donation receipts (Totaled) \$ _____
- Monthly Public Bus Passes (Totaled) \$ _____
- Tuition fees receipts
- Amount paid in installments \$ _____