Income Tax Preparation Checklist

--- Personal Information ---

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

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

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

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

[ ]  Citizenship\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Bank account if you want to set up or update your direct deposit with the CRA\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Notes: For all existing clients, we have your information on file. Just let us know of anything you want 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 get above slips from the CRA online service My Account. However, it is possible there are missing or incorrect slips. Therefore, we are still encouraging you bring all your tax slips while preparing your tax return.*

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

[ ]  T2202A

[ ]  Child care expenses\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Spousal support payments\_\_\_\_\_\_\_\_\_

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

[ ]  Monthly bus passes up to June 2017\_\_\_\_

[ ]  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* [*incomeTaxOttawa.ca*](http://www.IncomeTaxOttawa.ca)*.*