



Personal Tax Checklist

A-1 Accounting & Business Solutions Inc/Calgary EZ Tax
Phone: 403-226-8297 / 403-460-3095 (Copperfield)



Please provide us with any of the following items applicable to your situation for the tax year that you would like us to file for you:

- Your legal name, date of birth, address, and phone number
- Your spouse or common-law partner's name, date of birth, and SIN number
- Dependent children – names and dates of birth
- All T4 slips for employers
- All other income slips (T3, T5, T4E, T4A, T4AP, T4RSP, T4RIF)
- Charitable / Political donations receipts
- Investment receipts (share buy and sell along with statement)
- RRSP tax receipts
- Health bills (pharmacy, massage, chiropractic, natural healing, dental, etc.)
For the family if not claimed by spouse.
- Public Transit passes
- Childcare (nanny, daycare, school receipts, child tax credit...)
- Child support payments or alimony payments
- Tuition & Education amounts/tax receipts, interest paid on student loans
- Revenue Properties information if applicable
- Moving expenses if applicable
- Declaration of Conditions of Employment (T2200) and receipts for work expenses if you are not reimbursed for them
- Old Age Security and CPP benefits and other pensions and annuities
- Employment Insurance benefits, Workers' Compensation benefits, or Social Assistance payments if applicable
- Notice of Assessment for the last tax year filed and a copy of your tax filing for the previous year
- Any other tax-related correspondence from the government for the current year

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