

What to Bring

Exactly what we need to do your return right. Incomplete is normal, start anyway.

Personal return

- ☐ Last year's return & notice of assessment
- ☐ All T4s, T4As, T5s, T3s, T5008s
- ☐ RRSP contribution receipts
- ☐ FHSA / TFSA activity if asked
- ☐ Donation & medical receipts
- ☐ Childcare, tuition (T2202)
- ☐ Instalment payments made
- ☐ Any CRA letters

Business owners

- ☐ Bank & credit card statements, full year
- ☐ Receipts, photos or the shoebox
- ☐ Payroll records, if anyone gets paid
- ☐ HST filings made this year
- ☐ Last corporate return & statements
- ☐ Loan or lease agreements
- ☐ Home-office & vehicle details
- ☐ Incorporation documents (new clients)

Rental properties

- ☐ Last year's T776 per property
- ☐ Rent collected, by property
- ☐ Mortgage statements (interest paid)
- ☐ Property tax & insurance bills
- ☐ Repairs vs. improvements receipts
- ☐ Utilities paid by you
- ☐ Purchase/sale documents if bought or sold
- ☐ Co-owner details and split

Send it all through the secure portal, email, or paper drop-off at Harvester Road. Free parking, coffee on us.