

Client Name: _____

Phone: _____

Spouse/Dep: _____

Email: _____

Email: _____

MOST COMMON INCOME ITEMS:

- All current year Tax Slips (T3's, T4's, T4a Pensions, T4a CPP & OAS, T4RRSP's, T4RIF's, T5's, T5008's etc.)
- Self Employment income and expenses (if applicable) (Please complete and attach **T2125 Worksheet**)
- Rental income and expenses (if applicable) (Please complete and attach **T776 Rental Worksheet**)
- Details of Capital Gains** / Realized Capital Losses (including Investment Advisor worksheets and expenses)

- Is there potentially missing slips or other income which needs to be reported on your tax return? Y / N

DEDUCTIONS AND CREDITS:

- RRSP receipts for balance of current tax year being reported, plus 1st 60 days of the following year;
- Allowable Medical receipts (Out of pocket Doctor, Dentist, Optometrist, Naturopath, Prescriptions etc.)
- Donation receipts (up to Feb. 2025) for gifts to registered Canadian charities; Digital Media subscription receipts
- Employment expenses and working from home details (Complete T2125 Worksheet and **attach T2200**)
- Other items: Tuition/Education receipts (T2202a), Child Care, Union Dues, Support Payments etc.

- Are there other deductions or credits you wish to claim or discuss? Y / N _____

OTHER ITEMS:

Copy of the Last Tax Return filed with the CRA (Required for **All New Clients**)

New Contact Information: Address, Phone Number and/or Email (If you are a returning client and there are **changes**)

Changes to Marital status, dependants, living arrangements, residency or any important **CRA Correspondence**

And any other potential information unique and specific to your personal tax situation
