



PrairieVista Tax Services Inc.
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Income Tax Preparation Checklist

--- Personal Information ---

- | | |
|--|--|
| <input type="checkbox"/> Social Insurance Number _____ | <input type="checkbox"/> Citizenship _____ |
| <input type="checkbox"/> Mailing address _____ | <input type="checkbox"/> Bank account if you want to set up or
update your direct deposit with the
CRA _____ |
| <input type="checkbox"/> Date of birth _____ | |
| <input type="checkbox"/> Marriage status _____ | |

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)

- | | | |
|--------------------------------|-----------------------------------|---|
| <input type="checkbox"/> T4 | <input type="checkbox"/> RC62 | <input type="checkbox"/> T5007 |
| <input type="checkbox"/> T5 | <input type="checkbox"/> T4A | <input type="checkbox"/> T5008 |
| <input type="checkbox"/> T4RSP | <input type="checkbox"/> T4A(P) | <input type="checkbox"/> RRSP contribution slip |
| <input type="checkbox"/> T4E | <input type="checkbox"/> T4A(OAS) | |
| <input type="checkbox"/> T3 | <input type="checkbox"/> T4RIF | |

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)

- | | |
|---|--|
| <input type="checkbox"/> T2202A | <input type="checkbox"/> Medical expenses _____ |
| <input type="checkbox"/> Child care expenses _____ | <input type="checkbox"/> Donations _____ |
| <input type="checkbox"/> Spousal support payments _____ | <input type="checkbox"/> Monthly bus passes up to June 2017 ____ |
| <input type="checkbox"/> Interest expenses or management fees to
earn income from investments _____ | <input type="checkbox"/> Interest paid on your student loans ____ |
| <input type="checkbox"/> Disability Tax Credit information – do you
need us to send documentation to CRA | <input type="checkbox"/> All tax slips from Revenue Quebec (RL-1,
RL-8 etc.), if applicable |
| | <input type="checkbox"/> Others |

--- Other Information ---

- | | |
|---|---|
| <input type="checkbox"/> Did you sell or purchase a home last year?
How much? Principle residence? | <input type="checkbox"/> Is this your first time filing a tax return? |
|---|---|

Other Checklists you may need

- | | |
|--|--|
| <input type="checkbox"/> Employment Expenses Income Tax
Checklist | <input type="checkbox"/> Moving Expense Tax Preparation Checklist |
| <input type="checkbox"/> Rental Income Tax Preparation Checklist | <input type="checkbox"/> Corporation Income Tax Preparation
Checklist |
| <input type="checkbox"/> Self-employed Tax Preparation Checklist | |