LDA TAX SERVICES

Personal Tax Checklist

Please provide the following documents that apply to you. **If you are unsure whether something is needed, send it to us and we will review it.**

🥷 PERSONAL INFORMATION

☐ Full name, address & date of birth
☐ Social Insurance Number (SIN)
☐ Marital status & spouse/common-law partner information
☐ Names & dates of birth of dependants/children
☐ Previous year's Notice of Assessment
☐ Any changes to your address, marital status or family situation

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☐ T4 – Employment income
☐ T4A / T4A(OAS) / T4A(P) – Pension & other income
☐ T4E – Employment Insurance
☐ T5 – Interest & dividends
☐ T3 – Trust/investment income
☐ T5007 – Workers' compensation or social assistance
☐ T5008 – Securities transactions
☐ Employment or other income not shown on a tax slip
☐ Foreign income, if applicable

💰 INVESTMENTS & RETIREMENT

☐ RRSP contribution receipts
☐ RRSP withdrawals
☐ FHSA contributions or withdrawals
☐ TFSA withdrawals/transfers, if applicable

☐ Investment purchase/sale statements
☐ Cryptocurrency transactions, if applicable

🏠 HOME & RENTAL PROPERTY

☐ Rent paid during the year
☐ Property tax information
☐ First-time home purchase information
☐ Home Buyers' Plan information
☐ Rental property income & expenses, if applicable
☐ Property purchase or sale information

🏥 MEDICAL & OTHER TAX CREDITS

☐ Medical & dental receipts
☐ Prescription medication receipts
☐ Glasses/contact lenses
☐ Medical insurance premiums, if applicable
☐ Charitable donation receipts
☐ Childcare expenses
☐ Eligible dependant expenses
☐ Disability-related information, if applicable

🎓 EDUCATION

☐ T2202 – Tuition & enrolment certificate
☐ Student loan interest
☐ Unused tuition amounts from previous years

🚗 SELF-EMPLOYMENT / BUSINESS

If you are self-employed or operate a business, please provide:

☐ Total business income
☐ Business expenses
☐ Vehicle expenses & business kilometres
☐ Home-office expenses, if applicable
☐ Business equipment purchases
☐ GST/HST information, if applicable

🌎 SPECIAL SITUATIONS

Please tell us if you:

☐ Became a resident of Canada during the year
☐ Left Canada during the year
☐ Earned income outside Canada
☐ Own foreign investments/property
☐ Sold a property or investment
☐ Received an inheritance
☐ Received CRA correspondence or were reassessed
☐ Need to file or correct a previous year's return

BEFORE SENDING YOUR INFORMATION

☐ I have provided all income slips I received.
☐ I have included receipts for deductions/credits I may be entitled to.
☐ I have advised LDA of any major changes during the year.
☐ I have provided any CRA letters or reassessments I received.

Not sure if you need to provide something?

Send it to us. We will review it and determine whether it is required.

LDA TAX SERVICES

Personal Tax Returns • Back Taxes • CRA Assistance • Tax Planning • Bookkeeping

📞 **647-980-6298**
✉️ **info@lda-itb.com**
🌐 **lda-itb.com**

“It’s not what you make — it’s what you keep.”