



Individual & Sole Proprietor Checklist



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<input type="checkbox"/>	<p>All common information slips (situation dependent) E.g. T3, T4, T4A, T4A(OAS), T4A(P), T4E, T4PS, T4RIF, T4RSP (etc.)</p>
<input type="checkbox"/>	<p>All other information slips (situation dependent) E.g. T10, T2200, T2201, T2202, T5, T5003, T5004, T5007, T5008, T5013, T5018 (etc.)</p>
<input type="checkbox"/>	<p>Other employment income and expenses E.g. Stock option plans, T1212, T2200 and related employment expenses and purchases</p>
<input type="checkbox"/>	<p>Other income and details E.g. partnership income, alimony, separation allowances, child maintenance, pensions, interest earned but not yet received (etc).</p>
<input type="checkbox"/>	<p>Child related expenses and details E.g. child care expenses, adoption related expenses, alimony, separation allowances, child care maintenance (etc).</p>
<input type="checkbox"/>	<p>Tuition Credits & Union / Professional Dues E.g. T2202 / TL11, interest paid on student loans, scholarships, fellowships, bursaries, union and professional fees.</p>
<input type="checkbox"/>	<p>RRSP Contributions E.g. Slips and receipts for any RRSP contributions made</p>



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<input type="checkbox"/>	<p>Donations, Political Contributions and Medical Expenses</p> <p>E.g. Receipts for donations, political contributions (federal and provincial), and medical expenses in tax year</p>
<input type="checkbox"/>	<p>Business income and expenses</p> <p>E.g. All business income received and related expenses such as advertising, meals, licenses, vehicles, fuel (etc.) <u>Bookkeeping may be needed - we can help</u></p>
<input type="checkbox"/>	<p>Investment income and expenses</p> <p>E.g. T5, T5008, T5013, interest income, interest paid for investments, investment account statements (etc.) <u>Bookkeeping may be needed - we can help</u></p>
<input type="checkbox"/>	<p>Rental income and expenses</p> <p>E.g. All rental income received and related expenses such as advertising, insurance, interest, repairs, taxes (etc.) <u>Bookkeeping may be needed - we can help</u></p>
<input type="checkbox"/>	<p>Capital Gains and Losses</p> <p>E.g. investment statements, security trading slips, principal residence details, previous exemptions and losses <u>Bookkeeping may be needed - we can help</u></p>
<input type="checkbox"/>	<p>Other details</p> <p>E.g. Spouse and dependent details (incomes, birthdates, SIN, address)</p>
	<p>We can discuss the smaller items in your free consultation</p>