

Personal Information:

- SIN
- address changes
- prior Notice of Assessment
- email address for all household members filing personal tax returns with Lipton LLP

Income Slips (T-Slips):

- T3 (Trust Income)
- T4 (Employment Income)
- T4A (Pension, Retirement, Annuity income, Directors fees)
- T4A(OAS) (Old Age Security)
- T4A(P) (Canada Pension Plan)
- T4FHSA (First Time Home Savings Account activities)
- T4(E) (Employment Insurance Benefits)
- T4(RSP) (RRSP Income)
- T4(RIF) (Registered Retirement Income Fund)
- T4(PS) (Profit Sharing Income)
- T5 (Investment Income) Please provide details of income allocation between joint account holders.
- T5013
- T5018
- Investment summaries.
- Other Income (where No Slips are available):
 - Employment income (tips, severance, stock options).
 - Business, gig economy, rental income, support payments, pensions.
 - Interest earned but not received, scholarships, bursaries, etc.

Capital Transactions:

- Capital gains/losses. (Realized capital gains and loss reports from financial institution).
- Details of Cryptocurrency transactions.

Deductible Expenses:

- Business, professional, farm, investment, or rental expenses.
- Employment expenses (T2200 required).
- Actual expenses for eligible work-from-home situations.

Credits & Deductions Documents:

- Childcare receipts.
- Medical expenses.
- T2200
- Donation receipts.
- Tuition (T2202).
- RRSP receipts.
- Rent/property tax receipts.
- Student loan interest.
- Disability tax credit.
- Foreign property details (T1135).**

Other Items:

- Installment summaries.
- CRA letters.
- Life event details.