

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.