

## Personal Tax Checklist – New Clients

To help us prepare your personal tax return accurately and efficiently, please review this checklist and provide all relevant documents.

### Steps:

1. Gather all relevant documents from the list.
2. Send them to our office via secure email or drop-off.
3. Once received, we will review and contact you for any clarifications.

---

### 1. Personal Information

- Full legal name and date of birth
- Social Insurance Number (SIN)
- Current address and contact information
- Marital status (as of December 31), indicate if any changes
- Spouse/common-law partner name, SIN, and date of birth
- Dependents' names, SINs, and dates of birth

---

### 2. Identification of Previous Tax Returns

- Last Filed Tax Return Notice of Assessment (from CRA)
- Last filed tax return, copy
- Any carry-forward amounts (RRSP, tuition, capital losses, donations)

---

### 3. Income Documents

#### Employment Income

- T4 slips (employment income, tax deducted)
- T4A slips (pensions, commissions, self-employment fees)

#### Self-Employment / Business

- **T2125** Statement of Business or Professional Activities (if applicable)
- Revenue and expense records (invoices, receipts)

#### Investment Income

- T5 slips (interest, dividends)
- T3 slips (trust income)
- T5013 slips (partnership income)
- Capital gains/losses from investments (buy/sell records)

#### Other Income

- T5007 slips (workers' compensation, social assistance)
- RRSP, RRIF, or pension income slips (T4RSP, T4RIF)
- Employment insurance benefits (T4E)
- Any foreign income (bank statements, foreign tax paid)
- Scholarships, bursaries, or grants (T4A)

Email: [services@bepec.ca](mailto:services@bepec.ca)

Phone: 250-589-7775

---

#### 4. Deductions & Credits

##### RRSP Contributions

- RRSP contribution slips (tax year and first 60 days of new year)

##### Childcare / Dependent Expenses

- Childcare receipts
- Spousal or dependent support payments

##### Other Deductions

- Professional or union dues
- Moving expenses (if eligible)
- Carry-forward capital losses
- Business-use-of-home expenses (if self-employed)
- Interest on student loans

##### Credits

- Medical expenses (receipts for self, spouse, dependents)
- Charitable donations receipts
- Tuition, education, and textbook amounts (T2202 or official receipts)
- Disability amounts or support payments
- BC Renter's Tax Credit (Rental address, Rent paid, Number of months, Landlord name)

---

#### 5. Property / Real Estate

- Rental property income & expenses (**T776**)
- Property tax and mortgage interest statements (if claiming home office or rental deductions)
- Sale of real estate (T2091, records of adjusted cost base and proceeds)

---

#### 6. Foreign Assets & Reporting

- Foreign bank accounts or investments over \$100,000 CAD (T1135) and/or (T1134)
- Foreign pensions or retirement accounts

---

#### 7. Other Supporting Information

- Previous year's TFSA, RESP contributions or withdrawals
- Any correspondence from CRA (audit letters, reassessments, outstanding balances)

---

#### Important Notes

- Please keep copies of all supporting documents for your records.
- Electronic copies are acceptable, but original slips may be requested by CRA.
- Providing complete documentation helps ensure accurate reporting and optimized tax savings.
- The taxpayer is responsible for the accuracy and completeness of all information provided.

Email: [services@bepec.ca](mailto:services@bepec.ca)

Phone: 250-589-7775