



#### A. Income

- General Filing Receipts (e.g. T3, T4OAS, T4AP, T4E, T4RIF, T4RSP, T4, T4A, T5, T5008)
- Rental Property Revenue & Expenses
- Business, Self-Employed Income & Expenses
- Capital Gain / Losses on Asset Disposition – Date & Cost of Purchase, and Date & Proceeds of Sale
- Other: \_\_\_\_\_

#### B. Deductions

- T2200 Employment Expenses
- RRSP Contributions
- First Home Savings Account (FHSA) Contributions & Withdrawals
- Union or Professional Dues
- Moving Expenses
- Investment Expenses (e.g. Interest, Management Fees)
- Child Care Expenses
- Support Payments
- COVID-19 Benefits Repayment (e.g. CERB, CRB)
- Other: \_\_\_\_\_

#### C. Credits

- Donations
- Medical Expenses, Including Plan Premiums
- T2202 Tuition Fees
- Student Loan Interest
- Training Credit
- Digital News Subscription
- Home Accessibility Expenses
- Multigenerational Home Renovation Expenses
- Home Buyers
- Caregiver Amount (Give Details of Dependant)
- Disability Tax Credit (must have a valid T2201 Disability Tax Credit Certificate on file)
- Other: \_\_\_\_\_

#### D. Supplemental Documents

- Your Latest Notice of (Re)Assessment(s)
- Your Previous Years' Tax Return
- Personal Information Form (for new clients)