

WHAT WE NEED TO PREPARE YOUR TAX RETURN

NAME _____ TAX YEAR _____

EASY WORKSHEETS & TAX TIPS available at www.bpgroup.ca

LISTED BELOW ARE ALL THE RECEIPTS/SLIPS/DOCUMENTS WE NEED TO PREPARE YOUR TAX RETURN.

T SLIPS REQUIRED TO SUBMIT	CHECK	TAX TOOLS	CHECK
T4 EMPLOYMENT INCOME		CHARITABLE DONATIONS	
T4E EMPLOYMENT INSURANCE		MEDICAL RECEIPTS	
T4A OTHER INCOME		PROPERTY TAX / RENT RECEIPTS	
T3 TRUST INCOME		RRSP CONTRIBUTIONS	
T5 INVESTMENT INCOME		CHILDCARE & FITNESS RECEIPTS	
T4AP CANADA PENSION PLAN		SPOUSAL SUPPORT PAYMENTS	
T4OAS OLD AGE SECURITY		PUBLIC TRANSIT RECEIPTS	
T4RIF RIF INCOME		CAPITAL GAINS/LOSSES	
T4RSP RRSP INCOME		UNION & PROFESSIONAL DUES	
T2202 TUITION RECEIPTS		MOVING EXPENSES	
		SAFETY DEPOSIT BOX	
LAST YEAR'S CANADA REVENUE AGENCY STATEMENT, Please attach last year's Notice of Assessment & any installment statements.			
EMPLOYMENT EXPENSES, If you are employed & you've obtained a T2200 Conditions of Employment, please download WORKSHEET FOR EMPLOYMENT EXPENSES at www.bpgroup.ca			
RENTAL PROPERTIES, If you are a rental property owner, please download WORKSHEET FOR RENTAL PROPERTIES at www.bpgroup.ca			
SELF EMPLOYED, If you are self-employed or own a business, please download WORKSHEET FOR SMALL BUSINESS at www.bpgroup.ca			

MY PERSONAL INFORMATION

NAME			
CURRENT ADDRESS			
BIRTHDATE			
EMAIL:		PHONE:	
SPOUSE'S NAME			
BIRTHDATE			
DEPENDENT NAME			
BIRTHDATE			



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TAX, ACCOUNTING & INVESTMENT SERVICES