

- ✓ **New Client Information**, please provide as much detail as possible (refer to website - Form #1)
- ✓ **Authorization – CRA Representative**, grant permission to communicate with the Canada Revenue Agency on your behalf (refer to website - Form #2, please complete fields where highlighted)
- ✓ Copy of **2023 Tax Return** or copy of **2023 Notice of Assessment**
- ✓ **Income slips from all your income sources**

Employment / Salary / Commission	T4, T4A slips
Pension Income (OAS / CPP / RRSP / RRIF)	T4A, T4A(P), T4A(OAS), T4RSP, T4RIF slips
Scholarships / RESP Payments	T4A slips
EI Benefits and Repayments	T4E slips
Investment Income	T3, T5 slips
Partnership Income	T5013 slips
Rental Income	Summary of income and expenses
Taxable Capital Gains and Losses	T5008 slips, no slips refer to website - Form #4
Spousal Support	Name and SIN of payer, amount received
Self-Employment / Business Income	Summary of income and expenses
WSIB / Social Assistance	T5007 slips
Tips / Gratuities	Record amount received
- ✓ **If you have any deductions or credits to claim**

Pension Plan / RRSP Contributions	T4, T4A slips, official receipts from bank
First Home Savings Account Contributions	T4FHSA
Union or Professional Dues	T4 slips, official receipts
Child Care Expenses	Receipts
Moving Expenses	Details of Expenses, old resident address
Spousal / Child Support	Name and SIN of payee, amount paid
Interest Expenses / Investment Expenses	Details and purpose of the loan
Employment Expenses	T2200 (S) from employer, receipts
Canada Caregiver Amount	T2201 or signed statement by medical practitioner
Volunteer Firefighter Amount	Confirmation of hours volunteered (min. 200 hrs)
Home Buyer's Amount	Statement of adjustments (from lawyer)
Home Accessibility Expenses	Details; renovation receipts
Adoption Expenses	Receipts
Digital News Subscription Expenses	Receipts; up to \$500
Disability Amount (Self or Transferred)	T2201 completed by medical practitioner
Interest Paid on Student Loans	Official receipts
Tuition Fees	T2202 (download from school), TL11 (foreign)
Exam Fees	Receipts
Medical Expenses	Receipts; prescription summary (from pharmacy)
Charitable / Political Donations	Official receipts
Multigenerational Home Renovation Credit	Delivery slips, invoices, payment and details of reno.
Eligible Educator School Supply Tax Credit	Eligible receipts, certification from employer
- ✓ **Sale/change of use of principal residence must be reported**; please provide the following information - *Purchase Year, Sale Date and Proceeds*
- ✓ **If you rent your residence**; you need a letter or receipt from your landlord that states
 - Your name
 - Landlord's name and contact information
 - Address and number of months resided there
 - Amount of rent you paid during the year
- ✓ **If you own your home**; you need your property tax bill from the City of Hamilton or other municipality
- ✓ **Executor preparing final return**, please provide a copy of the will and death certificate