

Personal Tax Document Checklist

We want to ensure you receive every tax credit and deduction you are entitled to. So, before you drop your documents off at Wolfond Financial, please complete the below questionnaire and checklist to be sure we have all the information required to process your return efficiently and effectively.

REQUIRED DOCUMENTATION

- ☐ Copy of previous years' CRA Notice of Assessment and Re-Assessment if applicable.
 - ☐ All relevant tax slips/details (checklist on pages 2 & 3)

PERSONAL INFORMATION

As a new client to CH Financial, we want to ensure that we have accurately captured your personal details. This information can dramatically impact your tax filing, and we want to make every effort to include all pertinent information to be sure we are filing your return accurately and efficiently. Please answer the questions below. If you would like to elaborate on any questions, please use the space below.

Name: _____ Spouse/Partner's Name: _____

Marital Status: ☐ Married ☐ Common-law ☐ Widowed ☐ Divorced ☐ Separated ☐ Single

If your marital status changed during the year, please provide date of change:

Number of Dependents: Citizenship: Do you own a corporation? ☐ Yes ☒ No

Changed jobs this year? ☐ Yes ☐ No

Do you have a trust? ☐ Yes ☐ No

Are there dates (March through April) you will be unable to be contacted? ☐ Yes ☐ No If yes, _____

Did you at any point own any asset outside of Canada (including stocks, bonds & bank accounts) totalling over 100k? ☐ Yes ☐ No

ADDITIONAL INFORMATION

[illegible]

The following pages provide a thorough (though not exhaustive) list of items that are important to include with your tax package. Please review, check off the items that relate to your situation, and return all pages to us with your tax documentation. Do not hesitate to contact our office if any questions arise. We are looking forward to assisting you with your tax filing this year.

INCOME – DID YOU RECEIVE:	YES	NO	IF YES – SEND US:
Employment or commission income			T4 or T4PS slips and details of other benefits or employment income not on T4 slips
Payments from an estate or trust			T3 slips or related information
Old Age Security benefits			T4A(OAS)
Canada Pension Plan benefits			T4A(P)
Pension income			T4RSP/T4RIF/T4A slips
Employment Insurance benefits			T4E slip
Canadian dividends or interest			T5 slip
Investment in tax shelters/limited partnerships			Details, T5013, etc.
Universal Child Care Benefits			RC62 slip
Income from sources outside of Canada			Slips or details where no slips available
Rental/business/professional/farming/fishing income			Details of income and expenses
Are you registered for GST/HST? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Proceeds from the sale of any stock, bond, real estate timber or options or redemption of any mutual fund units			Description of assets, year of acquisition, date and proceeds of disposition, adjusted cost base and selling costs, and your annual trading summary
RESP Income			T4A
Promissory Note interest payment			Copy of cheque and/or details
TAX DEDUCTIONS – DID YOU:	YES	NO	IF YES – SEND US:
Contributed to a RRSP or FHSA(First Home Savings Account)			Tax receipts
Contributed to or a rollover of Saskworks or Golden Opportunities			Federal and provincial tax receipts – T2C
Pay interest on your student loan in the current year, or in prior years and have not claimed it			Interest statements
Pay union or professional dues			Tax receipts
Incur moving expenses			Details
Pay childcare expenses so you could work or attend school (including summer camp)			Receipts/details: To whom, SIN, Address, Amount (\$), # of weeks (if boarding school or camp)
Make charitable or political contributions			Tax receipts
Pay or receive alimony or maintenance support pursuant to a court order or written agreement			Copy of agreement – details: To/from whom, SIN, Address, Amount (\$)

TAX DEDUCTIONS – DID YOU:	YES	NO	IF YES – SEND US:
Incur expenses to earn investment income (i.e. safety deposit boxes, investment counsel fees, interest)			Details and receipts
Incur any expenses to maintain an office in your home as required by your employer			Form T2200 to be completed by your employer Details of GST paid by you for the expenses
Incur any automotive or business expenses as an employee			Form T2200 to be completed by your employer Auto log
Buy any tradesman's or apprentice mechanic's tools			Receipts
You or your spouse or dependent child become disabled during the year			Form T2201 to be completed by your physician
Pay unreimbursed medical/dental expenses			List of expenses and the receipts -annual pharmacy statement
Support any relative who is disabled, or reside with and provide in-home care for a parent or grandparent who is over 65 (or for an infirm dependent adult relative)			Details, including the income of the person receiving the care.
Invest in any tax shelters or receive any reporting regarding any prior years			Details, T5013, etc.
Adopt a child under 18 years old during the year			Details of adoption fees and other expenses
Pay any foreign taxes			Details
Purchase your 'first home' or one for a disabled person			Details
You or your dependent/spouse attend college or university			Form T2202A
Did you graduate in 2023?			Graduate Retention Program Certificate GRP
OTHER – DID YOU:	YES	NO	IF YES – SEND US:
Pay any federal tax instalments for the taxation year other than amounts deducted from pay cheques			Amount (\$) – provide receipts and latest statement of account
Withdraw from your RRSP during the year or in a prior year for the Home Buyer's Plan or Life Long Learning Plan			Details
Do you have any connection to any other country?			Details of foreign association