

**LIST OF DOCUMENTS TO BRING****Taxation year :** \_\_\_\_\_

**Client:** \_\_\_\_\_ **Partner:** \_\_\_\_\_  
 (First name, Last name) (First name, Last name)

**Client Partner**

- FEDERAL Notice of assessment for the last year declared  
  PROVINCIAL Notice of assessment for last year declared  
  Cheque specimen if never requested direct deposit

*For new clients with rental income or self-employment income*

- Last federal and provincial tax report (full version)

**INCOME**

- Employment income : T4 (FEDERAL) + Relevé 1 (PROVINCIAL)  
  Investment income : T3, T5, T4A, T5008 ou Summary of gains / losses, etc.  
  Scholarship : T4A  
  Public retirement: Old age security: Fed:T4A(OAS); Prov:T4A (P); Private:T4A  
  Employment Insurance (unemployment), CERB: T4E  
  Parental insurance benefits (parental leave): T4E  
  CSST, SAAQ, Welfare: T5007/RL5  
  Self-employed (income & expenses)  
  Work expenses: TP-64.3+T2200 (*Only if you have eligible expenses*)  
  Work expenses – Actual spending  
  Rental income (*income & expenses*)  
  T1135 if you own more than 100 000\$ of assets outside Canada

**DEDUCTIONS**

- RRSP  
  Tuition fees: Relevé 8/T2202A  
  Interest paid on student loans: Bank or Caisse account receipt  
  Medical expenses  
  Moving expenses  
  Last pay slip of the year for EACH EMPLOYER (*if private health care plan*)  
  Public transit passes (before 30.06.2017)  
  Charity donation / Political contributions  
  Union dues or professionals dues (*if other than on T4*)  
  Instalments/ provisional payments: official government statement  
  Home support services (*if you are 70 or older*)  
  Solidarity tax credit: Relevé 31 (*if tenant*) or City taxes ID number (*if owner*)

**KIDS**

- Childcare expenses: RL-24 Not Subsidized, RL-30 Subsidized  
  Childcare tax credit advance payments: RL19  
  Programs of physical and artistic activities of children

**Other:** \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_  
(ddmmyy)