

Documents needed for your Personal Tax filing:

1. Social Insurance Numbers for you, your spouse, and any dependents (if applicable)
2. Dates of birth for family members
3. Income: employment income (T4, T4A slips), pension Income, employment insurance benefits, investment income-interest dividends (T5 slips), estate/Trust/mutual fund income (T3 slips), Partnership income (T5013), Rental income and expenses, Capital Gains, Self-employment income and expenses, retirement income, other income, support received, death benefit, ...
4. Deductions and Credits: RRSP contributions, Tuitions receipts (T2202 form), Union and professional dues receipts, Child care expenses (Sin, name and address of Caregiver), moving expenses, Medical expenses, Home office expenses, Amount of property Tax/ Rent paid in year (include landlord name and address of property), Charitable donations, Student loan interest statement, Accommodation expenses in Ontario
5. Other: copy of [Notice of Assessments](#) from last year's return (new customers), Income Tax installments, Details of any Residence sold during the year, list of foreign property owned if cost >\$100,000.

Documents needed for your Corporation Tax filing:

1. Article of incorporation
2. Latest Financial statements
3. Full Fiscal Year Business bank statements and credit card statements (the cancelled cheques for bank statement needed)
4. Sales for the fiscal year
5. A/P, A/R as of Fiscal Year End
6. Business number and HST filling form
7. Current Corp address and phone number
8. Shareholders information: Name and SIN and percentage of share
9. Current payroll records and latest T4 Summary and employees earing summary
10. All the business related bills and purchase invoice

Thank you for choosing our company.



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