

IT'S PERSONAL TAX TIME!

Now is the time to begin saving information slips necessary to file your tax return. Please review the list below and gather all the required slips and information as it pertains to your situation.

- Signed engagement letter (attached)
- Updated personal information (attached)
- Notice of Assessment from prior year
- All T-slips (T4's, T3's, T5's, etc.)
- Tip information if applicable
- Universal child care benefit (RC62)
- RRSP contribution slips
- Medical receipts, including private health care premiums
- Donation slips
- Business/proprietorship income (please refer to the business checklist)
- Investment income (broker statements, cost and sale information)
- Real estate (sale documents, details of purchase)
- Child care expenses
- Moving expenses (please refer to the moving checklist)
- Tuition receipts
- Safety deposit box
- Public transit passes
- Children's fitness receipts (limit \$500 per child)
- Children's arts receipts (limit \$500 per child)
- Commission income; a signed T2200 (please refer to employment expense checklist)
- Union or association dues
- Rental income (please refer to the rental property checklist)
- Taxable alimony support received
- All Canada Revenue Agency correspondence
- All additional information deemed to be relevant

I've included any checklists that I believe are relevant based on my knowledge of your information. Please contact me if your situation if you require any of the other checklists mentioned above.

Please contact me when you are ready to provide me with your documents so that we can make appropriate arrangements.

If you wish to submit your documents to me electronically, please contact me to create a user name and password to gain access to your own confidential client portal. This secure and confidential portal will allow you to upload scanned/digital copies of all your documents without worrying about anybody else seeing it and/or getting lost in the mail or digital space.

I prepare all tax returns based on a first come, first serve basis, so the sooner you provide all the documents to me (i.e. before I receive most of them) the quicker I can get your return done.

Should you have any questions, do not hesitate to contact me at (780) 980-0467 or via email at mel@melaniegesy.ca.

Sincerely,



Melanie Gesy, CA