

PERSONAL TAX CHECKLIST:

Please send one upload of all documents below to our secure link on our website.

If this is your first year filing having DAL complete for tax return, please provide us with a copy of your previous filed tax return and NOA from the CRA.

Taxpayer's Name		Spouse's Name (If applicable)	
Taxpayer's SIN & Birthdate (dd/mm/yy)		Spouse's SIN & Birthdate (dd/mm/yy)	
Address			
Taxpayer's Email for DocuSign:		Spouse's Email for DocuSign:	
Taxpayer's Phone:		Spouse's Phone:	
<i>Taxpayer's Checklist</i>		<i>Spouse's Checklist</i>	
ITEM INCLUDED	YES	NOTES	YES
T-slips (T3, T4, T4A, T4E, T4OAS, T4P, T5, T5018, T4RSP, T4RIF, etc.			
Donation Receipts			
RRSP & FHSA Contribution slips			
Medical Receipts			
Child Care Receipts			
Sale of Real Estate ?- (Year & Price of purchase and sale) and associated fees			
Did you sell your principal residence (the house you lived in) If Yes - provide Statement of Adjustment from lawyers.			
Investments (tax package from broker with foreign reporting and realized gains/loss summary)			
Foreign Property (over \$100,000) Provide completed T2200 and related expenses.			
T2200A Tuition Slip, Tuition amounts Certificate			
Business (Income and Expenses) - Client provided information (DAL worksheet, excel or all records)			
Interest on money borrowed to invest (Statement or Amounts)			
First Time Home Buyer - Year of purchase			
Did you change the use of your real estate property? (Rental to Principal or vise versa).			
Rental Income (DAL worksheet, excel or all records)			

DEPENDENT INFORMATION (Under 18 Years old)

Name	Relationship	Birthdate (dd/mm/yy)	SIN	Income

Are you registered for CRA My Account?

Yes	No
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Do you have Canadian citizenship?

Yes	No
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As a canadian citizen, do you authorize DAL to give your information to Elections Canada to Register for Future Elections?

Yes	No
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SUMMARY

Once you have collected the applicable informaton, please forward through our secure link on our website www.dalevinson.com. We will prepare your return based on the information you provided to us and electronically file it with Canada Revenue Agency. It is your responsibility to ensure the accuracy and completeness of this information. We do not audit, review or otherwise verify the accuracy of this information. If you have any questions, please contact admin@dalevinson.com

I confirm the accuracy and completedness of the information provided and agree to the terms outline above.

Signature: _____

Date: _____

Comment Section for Tax Preparer: