

- **Confirm personal information** including marital status, dependents, address, cell phone, and email.
  - Provide details of dependents for whom you are claiming personal tax credits (caregiver, disability, eligible dependent) or if you are eligible for the disability tax credit.
  
- **Gather T-documents:**

○ <b>T4</b> employment income	○ <b>T4A</b> pension, annuity, OAS, CPP
○ <b>T4RIF</b> receipts from RRIF	○ <b>T4RSP</b> receipts from RRSP
○ <b>T4E</b> E.I./C.E.R.B. benefits	○ <b>T5</b> interest or taxable dividends
○ <b>T5008</b> disposition of securities	○ <b>T101 &amp; T102</b> resource expenses flow-through shares
○ <b>T5006/T2C</b> Labour Sponsored Venture Capital Contributions	○ <b>T2200</b> conditions of employment signed by employer
○ <b>T2202A</b> tuition receipts (endorsed by transferors if needed); student loan interest paid	○ <b>T5013</b> partnership income/loss
○ <b>T2222</b> northern resident deduction; proof of residency; travel documents & receipts	○ <b>T3</b> income from mutual funds and trusts; include income trust units
  
- Provide **self-employment** details:
  - Revenue and expenses
  - Farming information
  - GST information
  
- **Gather receipts:**

○ <b>RRSP</b> contributions; include Home Buyers Plan, Life-time Learning Program withdrawals	○ <b>Union</b> or professional dues
○ <b>Medical</b> expenses; include Home Accessibility Tax Credit if applicable	○ <b>Charitable</b> donations
○ <b>Child care</b> expenses	○ <b>Political</b> donations
○ <b>Child or spousal support</b> payments	○ <b>Tax installment</b> receipts or statement from Canada Revenue Agency (CRA)
○ <b>Early Childhood Educator School Supply Tax Credit</b> applicable expenses, for teachers only	○ <b>CRA Notice</b> of assessment/reassessment
○ <b>Real estate</b> acquisitions and/or dispositions during the year, including principal residence	○ <b>Employment expenses</b> such as home office, meals
  
- Provide **non-registered investment** details. If applicable, your banker/broker can provide a list of all investments purchased and sold (sale price, cost, outlays), management fees paid, and a capital gain/loss trading summary. Include foreign investments held personally.
- Provide summary of **rental properties**; list expenses by property and include receipts.
- Provide details of **loans** for business or investment purposes; include interest amount paid.
- If not prepared by us, please submit copies of prior years' tax returns.

Submit all applicable information to Berger Cavan Group by mail, drop off (Covid-19 protocols in place), fax 306-347-2247 or email [info@BCGLLP.ca](mailto:info@BCGLLP.ca)

*A more detailed tax preparation checklist is available on our website at [www.BCGLLP.ca/resources](http://www.BCGLLP.ca/resources)*