



Owner-Managed / Corporate Clients

Please use the checklist that matches how you earn your income. Provide only the items that apply to you.

Claims related to vehicles, home offices, and asset purchases are subject to increased review. Complete records help us support your filing and avoid reassessments

1. Personal Information

- ☐ SIN and date of birth
- ☐ Marital status (note if it changed during the year)
- ☐ Spouse and dependant information
- ☐ Prior-year personal and corporate Notices of Assessment
- ☐ CRA correspondence (personal and corporate)

2. Income Slips & Benefits

- ☐ T4 slips (salary paid)
- ☐ T5 slips (dividends received)
- ☐ Bonus accrual and payment confirmations
- ☐ Automobile or standby benefit details
- ☐ Shareholder loan activity

3. Investments & Property

- ☐ Personal and corporate investment income
- ☐ Capital gains or losses
- ☐ Property acquisitions and disposition
- ☐ Holding company activity
- ☐ Rental property information (if applicable)
If you have multiple properties, please provide for each property.
 - ☐ Property address and ownership % (if co-owned)
 - ☐ Rental income received
 - ☐ Rental expenses - Mortgage interest only (principal portion not deductible), Property taxes, Insurance, Repairs & maintenance, Utilities (if paid by landlord)

4. Registered Plans

- ☐ RRSP contribution receipts
- ☐ Pension or IPP documentation (if applicable)

5. Deductions & Tax Credits

- ☐ Personal charitable donations
- ☐ Corporate charitable donations
- ☐ Medical expenses
- ☐ Family-based tax credits
- ☐ Multigenerational Home Renovation Tax Credit (MHRTC)
- ☐ Home Buyers' Amount

6. Business Income & Expenses

- ☐ Corporate financial statements
- ☐ General ledger or bookkeeping summaries
- ☐ Professional fees and insurance
- ☐ Management fees
- ☐ Related-party transactions

7. Assets & Incentives

- ☐ Capital asset purchases or disposals
- ☐ Zero-emission or clean-energy equipment
- ☐ Lease vs purchase agreements
- ☐ SR&ED documentation (if applicable)
- ☐ Provincial or investment tax credit support

8. Compliance & Reporting

- ☐ HST/GST returns
- ☐ Payroll remittances
- ☐ Corporate instalments
- ☐ Trust reporting information
- ☐ Foreign property reporting (T1135)
- ☐ Beneficial ownership disclosures