



Here is what we would need to get you started. Please email back answers and information for the following to the Partner on your file.

1. Sign form T1013 Authorization – this allows me to represent you with CRA and access your information with their network. This form can be downloaded from the Resource Section of our Website.
2. Full name
3. Date of Birth
4. Social Insurance Number
5. Marital status
6. Personal and preferred email address
7. Are you registered for CRA My Account? If not, please register at the following CRA link: <https://www.canada.ca/en/revenue-agency/services/e-services/e-services-individuals/account-individuals.html>
8. Do you want to register for CRA email notifications? If yes, let me know the preferred email address.
9. Name of spouse, Date of Birth, SIN, approximate income of spouse
10. Name, SIN, Date of birth of all dependents
11. Current mailing and living address
12. Let us know if you moved, purchased, or sold a property from last year
13. Do you own any foreign property or bank/investment accounts with a cost over \$100,000 Cdn?
14. Prior year personal tax return copy
15. All tax slips for the current year
16. List of all donation amounts and to whom
17. List of rent paid or property taxes paid for the year
18. Let us know if you have any investment rental properties, if Yes, please download the Rental Worksheet on the Resources section of our website
19. Let us know if you have any self-employed income, if Yes, please download the Income Expense Worksheet on the Resources section of our website