

Name of requestor

Name of partner

Instructions

Please sort your documents in the order of the documents in this list.

The new platform is simpler and faster

A fee of \$250 per return applies to manual drop method, as we perform manual validation of documents and a manual estimate of fees. Try the Smart Drop if you can.

Documents to bring**Mandatory**

- Last federal **and** provincial notice of assessment*
- Last federal **and** provincial income tax return (only for new clients)*
- Cheque specimen if never requested direct deposit:
 - If not provided previously
 - **Mandatory** for Solidarity Tax Credit*

Income

- Employment income: T4 (federal) / Relevé 1 (Quebec)*
- Investment income: T3, T5, T4A, T5008
or Summary of gains / losses, etc.*
- Scholarship: T4A*
- Public retirement: Old age security: T4A (OAS) + QPP: T4A (P) *
- Employment Insurance (unemployment): T4E slip*
- Parental insurance benefits (parental leave): T4E slip*
- COVID benefits: CERB or CESB or CRB or CRSB
or CRCB - T4A from CRA or T4E from Service Canada*
- CSST, SAAQ, Welfare: T5007/Slip 5*
- Self-employed (income & expenses) [Fill the form](#)
- Rental income (income & expenses) [Fill the form](#)
- Rental income (Building history) [Fill the form](#)
- T1135 if you own more than 100 000\$ of assets outside Canada
[Fill the form](#)
- Arrivals or departures from Canada [Fill the form](#)
- Principal residence disposition [Fill the form](#)
- Building Disposition (other than principal residence) [Fill the form](#)

Kids

- Childcare expenses: RL-24 Not Subsidized
- Childcare tax credit advance payments: Slip 19*
- Children's Fitness Tax Credit, Children's art tax credit (if your family income does not exceed \$163,800 for 2024 and the maximum is \$500 per child under 16 years old) *

Deductions

- Work expenses — regular: TP-64.3+T2200 + [Fill the form](#)
- Work expenses — COVID-19 without calculation (2020, 2021 et 2022 only): Maximum claim 500\$, nothing to provide
- Work expenses — COVID-19 with calculation (2020, 2021 et 2022 seulement): T2200S + TP-64.3 + [Fill the form](#)
- **New!** FHSA: Official receipts
- RRSP: Official receipts (1st March to 31 December) *
- RRSP: Official receipts (60 first days of the year)*
- Tuition fees: Slip 8/T2202 or T2202A*
- Interest paid on student loans: Bank or Caisse account receipt*
- Medical expenses [Fill the form](#)
- Moving expenses [Fill the form](#)
- Charity donation / Political contributions*
- Advanced Canada Workers Benefit (Form RC210)
- Union dues or professionals dues (if other than on T4)*
- Instalments / provisional payment: official government statement*
- Home support services for seniors (70 years old or more):
[Fill the form](#)
- Solidarity tax credit: Slip 31 (if tenant) or municipal tax statement (if owner)*

Other

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* Item included in our base price. Extra fees applies if more than 20 documents. All other documents result in additional charges, including those not mentioned.