Personal Tax Checklist

ACCPAS Professional Corporation
Personal Tax Checklist
Client preparation checklist for personal tax filing support
Version: 1.0

Use this checklist to organize personal tax documents before submitting information or booking a consultation with ACCPAS Professional Corporation.

About ACCPAS Professional Corporation

Built on 40+ years of Ottawa accounting practice history, ACCPAS Professional Corporation continues trusted local service from its central O'Connor Street office.

Why this checklist matters

A complete personal tax package helps ACCPAS review your information more efficiently, identify missing slips or receipts earlier, and reduce delays during tax season. If you are unsure which items apply to your situation, contact ACCPAS before submitting your documents.

How to use this checklist

Review each section, check off the documents already available, and use the notes areas to identify missing items or questions. If the situation includes missing records, CRA correspondence, deadlines, or uncertainty about which service applies, book a consultation with ACCPAS Professional Corporation.

Client information

Name / Business name	
Email / Phone	
Tax year / period	
Deadline or target date	

Checklist sections

Client and family information

- ☐ Full legal name and contact information
- ☐ Current address and prior address if moved during the year
- ☐ Marital status and date of change, if applicable
- ☐ Dependant names, dates of birth, relationship and income information
- ☐ CRA My Account access status and prior-year Notice of Assessment

Income slips and tax documents

- ☐ T4 employment income slips
- ☐ T4A, T4A(P), T4A(OAS), T4E, T4RSP, T4RIF, T5007, T5013 as applicable
- ☐ T3 and T5 investment income slips
- ☐ Other income not shown on a slip
- ☐ Foreign income or foreign property details, if applicable

Deductions and credits

- ☐ RRSP contribution receipts
- ☐ Medical expense receipts
- ☐ Charitable donation receipts
- ☐ Childcare receipts
- ☐ Tuition forms and student loan interest
- ☐ Union/professional dues and employment expenses where applicable

Rental, self-employment or side income

- ☐ Rental income and expense summary
- ☐ Self-employment income and expense summary
- ☐ Business-use-of-home records, if applicable
- ☐ Vehicle expense summary and mileage log, if applicable
- ☐ GST/HST information, if applicable

CRA and prior-year items

- ☐ CRA notices, letters, or requests
- ☐ Prior-year return and Notice of Assessment if new to ACCPAS
- ☐ Instalment payment records
- ☐ Questions or transactions that need review

Recommended additional sections

☐ A “Missing items” box for documents still outstanding

☐ A “Questions for ACCPAS” section

☐ A “Deadline / preferred filing timeline” field

☐ A “Ready to book consultation” checkbox

Missing items tracker

Missing document / information	Responsible person	Target date	Status

Questions for ACCPAS Professional Corporation

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Next step

If records are incomplete, deadlines are near, or professional review is required, book a consultation with ACCPAS Professional Corporation. When requested, bring in or upload the completed checklist and all available supporting documents.

Personal tax deadline reminder

For most individuals, the personal tax filing and payment deadline is generally **April 30**. If you or your spouse/common-law partner are self-employed, the filing deadline is generally **June 15**, but any balance owing is still due by **April 30**. Filling and paying on time can help reduce interest, penalties, and delays with benefits or credits.

Disclaimer

This checklist is for general preparation only. This checklist is not an official CRA form and does not replace professional advice, tax filing review, bookkeeping review, payroll review, or ACCPAS Professional Corporation’s assessment of the client’s situation.