



Reliable AOC

Accounting & Tax Services for All!

11 Steinway Blvd Unit-12b, Etobicoke, ON M9W 6S9 | Tel: (416) 675-1458 | Email: info@reliableaoc.com

General Document Checklist for New Client and Others

If you are First-Time Client or New Immigrant?

First Name: _____ Middle Name: _____ Last Name: _____

SIN: _____ Date of Birth: _____

Contact Number: _____ Email: _____

Marital Status: _____

Status Change Date: _____ (if changed in current year)

Current Address: _____

City: _____ Province: _____ Postal Code: _____

Date of Landing (for new immigrated): _____

Are you disable? Yes No

Did you sell any property? Yes No

Address of Property: _____

If yes, Selling Price \$ _____ Year of Purchase: _____

Are you a Canadian citizen? Yes No

Do you want to provide your name to Election Canada (only if you are a citizen?) Yes No



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If are married information of your spouse or common-law partner?

First Name: _____ Middle Name: _____ Last Name: _____

SIN: _____ Date of Birth: _____

Contact Number: _____ Email: _____

Current Address (if is not the same): _____

City: _____ Province: _____ Postal Code: _____

If you have children or Dependent?

Dependent 1

First Name: _____ Middle Name: _____ Last Name: _____

SIN: (if available) _____ Date of Birth: _____

Relationship to you: _____ Income (if any): \$ _____

Dependent 2

First Name: _____ Middle Name: _____ Last Name: _____

SIN: (if available) _____ Date of Birth: _____

Relationship to you: _____ Income (if any): \$ _____

Dependent 3

First Name: _____ Middle Name: _____ Last Name: _____

SIN: (if available) _____ Date of Birth: _____

Relationship to you: _____ Income (if any): \$ _____

Dependent 4

First Name: _____ Middle Name: _____ Last Name: _____

SIN: (if available) _____ Date of Birth: _____

Relationship to you: _____ Income (if any): \$ _____



If you want to Deposit your refund and other credit to Bank?

Bring Direct Deposit Form or Voice Cheque

If you are working or have income?

- T4 Slips – Employment Income
- T3 – Interest, Dividends, Mutual Funds
- T5 - Interest, Dividends, Mutual Funds
- T5007 – Social Assistant Payments
- T4E – Unemployment Insurance Benefit
- T4A(P) – Canada Pension Benefits
- T4A(OAS) – Old Age Security Benefits
- T4A – Other Pensions and Annuities
- T4RIF - Other Pensions and Annuities
- T4RSP – RRSP Withdrawal Slips
- T5007 – Worker’s Compensation Benefit
- T5008 – Investment, Capital Gain
- Or any other T Slips

We may download above slips from CRA portal if we have authorization.

If you are self employee?

Electrician, plumber, uber/lyft Driver, Truck driver, courier service provider, graphic designer, Lawyer, engineering services etc. (Follow our checklist “If you are self employee?”)

If you have Deduction or tax Credit?

- T2202A – Tuition and Education Receipts
- Childcare expense
- Spousal support payments
- Adoption expenses
- Interest expenses or management fees to earn income from investment.
- Medical expenses
- Moving Expenses (Follow checklist Called “If you have moving Expense?”)
- Donations
- Political contribution
- Interest paid to your student loan.
- Professional or union dues
- Office – in – home expenses (Following Checklist Called “If you use home for Business/Employment?”)
- Employment expenses (follow checklist “ if you have employment expenses?”)
- Exams for professional certification
- Expenses to support disability.
- Business investment loss
- Clergy residence
- Labour-sponsored investment funds



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If you live in Ontario and have paid rent?

- Address for which rent is paid.
- Monthly rent amount
- Number of months you paid rent.
- Name of Landlord

If you live in Ontario and have paid property tax?

- Address of Property
- Total property tax paid during the year.
- Municipality name

* Keep rent receipts for audit purpose