Services financiers MSA Financial Services
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PERSONAL INCOME TAX INFORMATION CHECKLIST

Use the following checklist to make sure you have collected all documents we need to prepare your income tax return.

☐ SERVICE AGREEMENT

*(Download and fill-out the **Service agreement** document found at https://msafs.com/en/documents.php)*

☐ PERSONAL INFORMATION

*(Download and fill-out the **Personal information** found at https://msafs.com/en/documents.php)*

☐ TAXES

- ☐ Copy of last year's income tax return (if you are a new M.S.A. client)
- ☐ Federal and Provincial Assessments from previous year plus any documentation received during the year
- ☐ All T slips – T3, T4, T5, T4RSP, T4RIF, RL-19, etc.
- ☐ Mortgage statement
- ☐ Municipal tax bill for the year or RL-31
- ☐ Leverage loan interest statement
- ☐ Charitable donations
- ☐ Child Care receipts - maintenance paid & received, etc.
- ☐ School receipts - tuition, education amount, etc.
- ☐ Capital Gain information – buy and sell orders
- ☐ Medical receipts, prescriptions – doctors, dentists, optometrists, etc.
- ☐ Installment statements and amounts
- ☐ HBP Home Buyers' Plan statement
- ☐ Balances (1994 capital gain election)

☐ INVESTMENT RECORDS

- ☐ Statements – December 31
  - ☐ Mutual Funds
  - ☐ Stock
  - ☐ Bank
  - ☐ Mortgage statement
  - ☐ Employment Benefits

☐ RENTAL INCOME AND EXPENSES

*(Download and fill-out the **Rental income** document found at https://msafs.com/en/documents.php)*

☐ SELF EMPLOYMENT – INCOME AND EXPENSES

*(Download and fill-out the **Business-related income and expenses statement** document found at https://msafs.com/en/documents.php)*

PLEASE ALSO PROVIDE ANY OTHER INFORMATION OR DOCUMENT WHICH WOULD HELP YOUR ACCOUNTANT SERVE YOU BETTER.

(MSA-Personal Checklist-en V. 2018-08)

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