

PERSONAL TAX CHECKLIST

It's that time again! Please upload your documents to your personal portal at your earliest convenience. Portal Location: www.oeosolutions.com



Your username is your **email** and if you cannot remember your password, you can reset it via the 'forgot password' link.

CHECKLIST

- | | |
|---|--|
| <input type="checkbox"/> All slips (T slips) | <input type="checkbox"/> Moving expenses (if applicable) (Note B) |
| <input type="checkbox"/> T2200 (if working from home) | <input type="checkbox"/> Tuition receipts |
| <input type="checkbox"/> Childcare expenses | <input type="checkbox"/> Interest payment receipts for applicable loans, mortgages |
| <input type="checkbox"/> RSP contribution slips | <input type="checkbox"/> HBP repayment information (if applicable) |
| <input type="checkbox"/> Medical receipts, including private health care premiums | <input type="checkbox"/> Union, professional and association dues |
| <input type="checkbox"/> Donation slips (charity, political) | <input type="checkbox"/> Rental income and expenses (if applicable) (Note C) |
| <input type="checkbox"/> Business income and expenses (if applicable) (Note A) | <input type="checkbox"/> Alimony and legal costs associated with child support (Note D) |
| <input type="checkbox"/> Investment income | <input type="checkbox"/> Sale / Purchase of primary residence |
| <input type="checkbox"/> US income (1099 / W2 – if applicable) | <input type="checkbox"/> Mortgage interest & property tax information on personal residence |

If a significant change has occurred (marriage, divorce, child, etc) – please book a call with one of our tax team (link - <https://www.oeosolutions.com/copy-of-appointments-1>)



Notes:

A – Business Income

For a sole proprietor or if you have a side hustle – you will need to provide us with

- a spreadsheet tracking your income and expenses or print outs for your sales (POS or Store Front) and expenses – usually spreadsheet is best
- bank statement for the first month and last months of the year
- your registered trade name (if applicable)
- your GST number (if applicable)

B – Moving Expenses

- Confirmation from employer for move (this is usually a slip they provide)
- All moving costs (cost of movers, hotels, gas receipts, meals, etc)
- Cost of rental while waiting for permanent residence (if applicable)

C – Rental Income

- The address where the rental is located
- List of owners and % owned for tax purposes
- Total rent amount for each property for the year
- All expenses for maintaining the property for the year (mortgage interest, property tax, repairs & maintenance, major repairs)

D – Legal Fees

- Legal fees associated with child support

Looking forward to working with you during this upcoming tax season!

The OEO Team