

Rana Accounting & Tax Services Inc.

Winnipeg, MB

Labib Rana

(431)374-6695

payhubmb@outlook.com



Returning Clients Checklist

Personal Information:

New Social Insurance Number

Change in Marital status and spouse's information.

Do you have any dependents or new dependents?

Change in **citizenship or immigration status**

Change in **residency province** as of December 31

Did you own foreign property over \$100,000? (T1135 required)

New Address (If **Yes** please provide to us)

Business and Self-Employment

Did you sell a principal residence or other property last year?

All Income Documents

T4 – Employment income

T4A – Pension, commissions, self-employment, scholarships

T5 – Investment income

T3 – Trust income

T5007 – Social assistance or workers' compensation

T4E – Employment Insurance benefits

T4A(P) – Canada Pension Plan (CPP)

T4A(OAS) – Old Age Security (OAS)

T5013 – Partnership income

T5018 – Subcontractor payments (construction industry)

T4RIF

Rana Accounting & Tax Services Inc.

Winnipeg, MB

Labib Rana

(431)374-6695

payhubmb@outlook.com



T5008 – Securities transactions (stocks, crypto)

T2202 / T2202A – Tuition

RRSP contribution receipts

Rental income (with summary)

Employment expenses (T2200/T777S)

Other slips (e.g., COVID relief benefits, if applicable in prior years)

Other Income:

Self-employment or business income (summary of income/expenses)

Capital gains (investment or property sales)

Foreign income or investments

Notice of Assessment (NOA) from CRA (most recent)

Details of installment payments made to CRA

Direct deposit changes or updates

Change in dependents' income (if **applicable**)

Digital subscriptions (for digital news tax credit)

Home Accessibility / First-Time Home Buyer / Multigenerational Home Renovation Credits

Disability Tax Credit status changes (T2201 renewal)

Did you receive any inheritance or large gifts (may affect tax planning)