



Fortress Accounting & Tax Services
77 Drew Street, Winnipeg, MB
204-293-8018 | 204-333-5767
idris.taxreturn@gmail.com
<http://www.fortressaccounting.org>

Income Tax Checklist

Checklist for Clients visiting our office.

- ✓ T-4 slips (statement of earnings).
- ✓ T-3 Slips (Mutual Funds, Investment).
- ✓ T-5 Slips (statement of Investment Earnings).
- ✓ Tuition fee receipts (T2202A form).
- ✓ Statements of rent paid.
 - Only one person per household may claim Rent.
- ✓ RRSP Investments, Mutual Funds Slips.
- ✓ Donations receipts.
- ✓ Child Care expenses –
 - Daycare receipts
 - Fitness fees receipts
 - Arts & cultural Fees receipts
 - Lunch programs receipts.
- ✓ Moving expenses receipts– if moving into/out of province for work or school.
- ✓ Medical receipts,
 - Dental receipts
 - Prescription receipt.
- ✓ Bus pass receipts.
- ✓ Direct deposit Information. (*Optional otherwise you will be receiving a check in mail*)
 - Brach Number or Transit number (5 digits).
 - Institution number (3 digits)
 - Account number (max 12 digits).
- ✓ Have you purchase your first house?



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Checklist for Clients using Online Service.

- ✓ Scan or picture of All slips and receipts listed above.
- ✓ Personal information
 - Date of Birth.
 - Marital status.
 - Phone number.
 - Dependants (children under 18, Parents or Grand parents)
 - Name
 - Date of Birth.
 - SIN number (No required).

You can email all you're the documents at idris.taxreturn@gmail.com or provide us with your DropBox link or Google Doc link.