

# SFH Accounting Personal Tax Checklist – Information to Upload to SFH Portal

## Personal expense receipts

RRSPs  
Tuition fees  
Professional dues  
Charitable donations  
Property tax paid  
Children's fitness amount  
Prescription drugs, medical expenses

## Examples of business receipts

Safety deposit box rental  
Rent paid and name of landlord  
Interest paid on loans for investments  
Business investment consultation fees  
Moving expenses if you moved 40+km for work  
Utilities, office and vehicle

## Examples of expenses

Information on any business investment losses  
Commissioned sales person expenses (business expenses)  
Schedule of purchase and sale of securities, commissions  
Paid Legal expenses to collect alimony, pension or retiring allowances

## Personal information & forms

SFH Personal tax login form SFH  
Engagement letter signed  
T1013 form signed authorizing a representative

## Tax slips & forms

T4 Statement of employment income  
T4A Statement of pension, retirement, annuity, T4RSP Statement of income from a registered retirement savings plan  
R4RIF Statement of income from a registered Retirement income fund  
T4U Statement of unemployment insurance  
T-5 Statement of investment income

T-5007 Statement of benefits from WS&IB  
T5008 Statement of securities transactions  
T5013 Statement of partnership income T3 Supplementary (capital gains etc.) T101, T102, T5103 from exploration and development expenses

## New clients

Copy of last tax return  
Copy of last Notice of Assessment