9-250 Bayview Drive, Barrie, ON L4N 4Y8 (705) 735-2550 fax (705) 721-4655 debbie@debbiesitzer.com

Debbie Sitzer Professional Corporation Chartered Professional Accountant Chartered Accountant



First Appointment Document Checklist	
T1 - Personal Return (Basic)	
Prior Year Notice of Assessment (NOA)	
Prior Year Tax Return	
T2 Corporate	_
Articles of Incorporation	
Officers Registry	
Shareholders Registry	
Directors Registry	
Prior Year Financial Statement	
T2 Corporate/Proprietorship	
HST Registration and Filing Dates	
Prior Year Tax Return	
Back up Copy of any Bookkeeping records	
WSIB documentation	
T2 Corporate/ Proprietorship/Rental/Employment Expens	es (as applicable)
Vehicle Loan/Lease Agreement	
Rental Purchase Agreement	
Mortgage/Loan Agreement	
Rental Sale Agreement	
Lease Agreement	
Death of Tax Payer	
Death Certificate	
Prior Year Tax Return	
Prior Year Notice of Assessment NOA)	
List of Assets	
Market Value of Assets at date of death of all investment	