



First Appointment Document Checklist

T1 - Personal Return (Basic)

Prior Year Notice of Assessment (NOA)	<input type="checkbox"/>
Prior Year Tax Return	<input type="checkbox"/>

T2 Corporate

Articles of Incorporation	<input type="checkbox"/>
Officers Registry	<input type="checkbox"/>
Shareholders Registry	<input type="checkbox"/>
Directors Registry	<input type="checkbox"/>
Prior Year Financial Statement	<input type="checkbox"/>

T2 Corporate/Proprietorship

HST Registration and Filing Dates	<input type="checkbox"/>
Prior Year Tax Return	<input type="checkbox"/>
Back up Copy of any Bookkeeping records	<input type="checkbox"/>
WSIB documentation	<input type="checkbox"/>

T2 Corporate/ Proprietorship/Rental/Employment Expenses (as applicable)

Vehicle Loan/Lease Agreement	<input type="checkbox"/>
Rental Purchase Agreement	<input type="checkbox"/>
Mortgage/Loan Agreement	<input type="checkbox"/>
Rental Sale Agreement	<input type="checkbox"/>
Lease Agreement	<input type="checkbox"/>

Death of Tax Payer

Death Certificate	<input type="checkbox"/>
Prior Year Tax Return	<input type="checkbox"/>
Prior Year Notice of Assessment NOA)	<input type="checkbox"/>
List of Assets	<input type="checkbox"/>
Market Value of Assets at date of death of all investment	<input type="checkbox"/>