



OBS TAX SERVICES

2026 Tax Readiness Checklist

Please provide all applicable slips, receipts, and supporting documents to help us prepare your return accurately and efficiently.

NEW CLIENTS

- CRA My Account access or authorize OBS as representative
- Last year's Notice of Assessment
- Government-issued photo ID
- Direct deposit banking information

EVERYONE

- Medical receipts and health plan premiums
- Donation receipts
- Crypto transaction records (if applicable)
- Government slips (T4E, T5007, RC62, T4FHSA)

EMPLOYEES

- T4 slips from all employers
- Union/professional dues
- Last pay stub if T4 not received
- T2200/T2200S employment expense forms

STUDENTS

- T2202 tuition slips
- Scholarship or bursary slips
- Student loan interest receipts
- Unused tuition carryforwards

INVESTORS

- T3, T5, and T5008 slips
- Capital gains summaries
- RRSP contribution receipts
- Foreign income or T1135 details

HOMEOWNERS / RENTERS

- Rent or property tax receipts
- Home Buyers' Plan details
- Purchase/sale closing documents
- Principal residence reporting info

SELF-EMPLOYED / SIDE HUSTLES

- Business income summary
- Expense receipts and bookkeeping
- Vehicle log and home office expenses
- GST/HST and online platform income

NEW CRA REPORTING

- Cryptocurrency purchases and sales
- Sale of home or investment property
- Online platform or gig income
- Foreign assets over \$100,000

Before Your Appointment: Please check CRA My Account for any outstanding slips. Many T3, T5, and investment slips are issued later in March.