Providing Your Electronic Documents: Personal Tax Season

When providing your electronic documents for personal tax season, kindly follow the guidelines, separated by taxpayer, as outlined below.

1. **Use the TG&C Personal Tax mobilizer to assist you in gathering your documents**
   2025 Personal Tax Checklist

2. **Organize your documents in the following order (as applicable for you):**
   A. T Slips (grouped by type such as T3, T4, T5, T5018, RRSP, etc.)
   B. Donations*
   C. Medical*
   D. Other (organized by type)
      I. CRA Notice of Assessment (new clients only)
      II. CRA Statement of Account (new clients only)
      III. Business Statement
      IV. Rental Statement
      V. Employment Expenses*
      VI. Management fees and interest paid for investment purposes
      VII. Capital Gains/Losses Reports
      VIII. Foreign Income Verification Report (T1135)

   *Please note the while we prefer to receive copies of all receipts to ensure accuracy and completeness, detailed summaries of donations, medical, and employment expenses are sufficient for preparation.

   However, you MUST keep copies of all expenses in the event CRA requests further documentation. Prescription summaries can be prepared by your pharmacy for annual totals.

   E. Any additional relevant information you wish to provide.

3. **Scan in PDF format**

   To make things more convenient, most mobile devices have a scanning application that can be used in lieu of a traditional scanner.

4. **Upload your documents to the secure link sent**

5. **Email info@tgccpa.ca to notify us that your documents have been uploaded.**