



Corporate Tax Checklist

- Incorporation certificate with incorporation date, company name, and serial number.
- Did the share structure or company name change since the last filing date?
- Full names and social insurance numbers of owners, with share structure.
- Set of financial statements, including balance sheet, profit/loss statement, and trial balance.
- Copy of last Annual Return (T2) filed with notice of assessment.
- Year end date with years you will be filing with us.
- Type of corporation.
- Business numbers. Please indicate whether you need payroll and GST done.
- Prior accountant (if applicable). Include contact numbers.
- Business number/payroll number (if applicable).
- Compensation methods: Did you pay salary, bonus, dividends, etc.?
- Electronic accounting file (accountants' copy, if applicable), preferably in Excel format.
- Anything else you feel we should know about, such as correspondence from the government, requirement for refinancing, etc.

Please also have the following available. We will not require these documents at first, but you may be asked for them later.

1. All your receipts and records, including minute book.
2. Shareholders' agreement.
3. Articles of incorporation.