Prepare for your tax consultation

Personal and newcomer preparation checklist

Use this checklist to organize records privately. It is not an upload form. Not every item applies; JAF confirms the required records after agreeing on your service scope.

For the first conversation

[ ] Tax year involved and a general description of the help needed.

[ ] Your questions, decisions or timing concerns.

[ ] Whether you have filed in Canada before or recently arrived.

[ ] Any business, rental, investment or foreign-income questions to mention generally.

Records to organize privately

[ ] Relevant income slips and other income records.

[ ] Previous return and notice of assessment, if available.

[ ] Records supporting deductions or credits you want to discuss.

[ ] A list of changes in work, family or residence circumstances.

Keep sensitive information out of public channels

Do not send SINs, tax slips, returns, identification, passwords or banking details through Instagram, ordinary email, WhatsApp or the general website form. Ask how to share required records appropriately after engagement.

Free initial consultation: jafaccounting.com | +1 (587) 917-7110

Prepare your business records

Business tax and bookkeeping checklist

Start with a list of what you already have and what is missing. Do not email this checklist with sensitive details. Fees and service responsibilities are agreed before work starts.

[ ] Business structure and reporting period.

[ ] Income records, invoices and receipts.

[ ] Expense records and notes explaining business purpose and use.

[ ] Existing bookkeeping files and the software currently used.

[ ] Questions about missing records or historical cleanup.

[ ] Details of significant purchases and changes to discuss after scope is confirmed.

[ ] A list of tax or bookkeeping questions and known timing concerns.

Confirm what is included

Discuss frequency, access, reporting, reconciliations and any historical work. Payroll, GST/HST filing, software subscriptions and tax preparation are not assumed to be included in every bookkeeping engagement.

A safe first step

A general description is enough to request a consultation. Do not send account credentials or documents through social media or the general inquiry form. Agree on appropriate record-sharing arrangements first.

General organizing guidance only. This checklist is not a tax calculation or a complete list of records for every situation. Updated October 28, 2026.

jafaccounting.com | info@jafaccounting.com | +1 (587) 917-7110