

FREE CALGARY ESSENTIALS RESOURCE

Tax Appointment Readiness

Prepare useful questions and records for a tax clinic or qualified preparer.

This is preparation, not tax advice. Calgary Essentials does not calculate, prepare, file, amend or represent a tax return and does not determine tax residency, deductions, credits or benefits.

Your filing situation

	Action	My note / status
☐	Is this your first Canadian income tax return?	
☐	Are you catching up on one or more missed years?	
☐	Did you enter or leave Canada during the tax year?	
☐	Did your marital status change?	
☐	Did a spouse or child live outside Canada?	
☐	Did you live or work in more than one province?	

Income map - categories only

	Action	My note / status
☐	Employment slips such as T4 or T4A.	
☐	Interest or investment slips such as T5.	
☐	Tuition document such as T2202.	
☐	Self-employment or income without a slip.	
☐	Foreign income before or after arrival.	
☐	Benefits, pensions or other income.	

Records to organize privately

	Action	My note / status
☐	Government-issued identity and immigration-status documents requested by the preparer.	
☐	Date of entry and information about residential ties.	
☐	Canadian tax slips and relevant receipts.	
☐	Previous return and Notice of Assessment, if any.	
☐	Foreign income or tax records that may be relevant.	
☐	Spouse/common-law partner and child information requested by the preparer.	
☐	Direct-deposit details only through the preparer's or CRA's secure process.	

Missing record tracker

Record	Who should provide it?	Requested date	Received

Questions for the preparer

Which tax years must I file?

What arrival/residency information do you need?

Which slips or records are missing?

Do foreign income, property or business details require a specialist?

How are benefits and family information handled?

What must I keep after filing?

Complexity flags

	Action	My note / status
☐	Uncertain tax residency.	
☐	Foreign property, investments or business.	
☐	Self-employment or cash income.	
☐	CRA review, reassessment, debt or unfilled years.	
☐	Separation, support, custody or spouse outside Canada.	
☐	A preparer requests account passwords or verification codes.	

Keep account control. Do not give Calgary Essentials your SIN, slips, return images, CRA credentials, banking information, passwords or verification codes.

	Action	My note / status
☐	Bring questions in writing.	
☐	Use the preparer's secure method for documents.	
☐	Confirm the preparer's name, role and contact information.	
☐	Keep your own copy of records and the completed return.	

Official sources and current instructions

Use these official pages for eligibility, required documents, fees, forms and current procedures. Calgary Essentials does not replace the issuing authority.

- **CRA - Newcomers to Canada and the CRA:** <https://www.canada.ca/en/revenue-agency/services/tax/international-non-residents/individuals-leaving-entering-canada-non-residents/newcomers-canada-immigrants.html>
- **CRA - Preparing to do your taxes:**
<https://www.canada.ca/en/revenue-agency/services/tax/individuals/educational-programs/preparing-your-taxes.html>
- **CRA - Tax slips:**
<https://www.canada.ca/en/revenue-agency/services/tax/individuals/topics/about-your-tax-return/tax-return/completing-a-tax-return/tax-slips.html>
- **CRA - Completing your return for newcomers:** <https://www.canada.ca/en/revenue-agency/services/tax/international-non-residents/individuals-leaving-entering-canada-non-residents/newcomers-canada-immigrants/completing-return-newcomers.html>

Source review: September 2026. Re-check official instructions before acting.