**CHECKLIST OF DOCUMENTS FOR SOLE-PROPRIETORSHIP BUSINESSES:**

**Special note: (We utilize Pandadoc for electronic signatures, which aligns with CRA guidelines and modernizes the document signing process)**

Please feel free to reach out to the Canada Revenue Agency (CRA) or any of our customers in our WhatsApp group or through our web appearance to verify our genuineness and authenticity. Additionally, we're open to any verification you may require to confirm our legitimacy.

CRA: 1-800-959-8281 Rep Id: V37Q3HQ (Anwar ul Haq)

<https://chat.whatsapp.com/Ii2QVcDjpak4Y4bT2VrSLZ>

[www.expectmoreaccounting.com](http://www.expectmoreaccounting.com)

WhatsApp: 647-717-1242

Email: info@expectmoreaccounting.com

As part of our commitment to accuracy and compliance, we want to inform you about our procedures for transmitting tax returns to the Canada Revenue Agency (CRA) via E-filing system:

1. Documents will be sent via email for your review and signatures before being transmitted to the CRA electronically.
2. Prior to transmitting your return to the CRA, you will be asked questions to ensure all necessary information is included and accurate.
3. Obtaining signatures on the first email is essential to connect our systems with the CRA central database, ensuring precision and accuracy in your tax filing process.

To facilitate the smooth processing of your tax return, please provide the following documents and information:

1. Picture of Identification (Driver’s license to verify address, DOB, Name, and address)
2. Picture of SIN Card
3. Marital status (Single, Married, Separated, Divorced, Common-law)
4. Details about spouse (First Name, last name, DOB, SIN, Address, phone number, Net Income-Please send pictures of legal ID and SIN card.)
5. Details of kids under 18 years of age (Name, DOB, SIN, etc.)
6. Citizenship status
7. Phone number
8. Email
9. Rent/ property tax paid during the previous calendar year (If paid by you along with the name of landlord/ Name of city)
10. Donations paid during the calendar year
11. Medical expenses paid during the calendar year
12. Any tax documents or tax summaries received from Employers/ CRA/ Institutions.
13. T4 received from Employers
14. T4A received
15. Tax documents/ summaries of any investment income
16. Tax summaries of capital gains or losses
17. Any other relevant documents
18. Uber/ Lyft/ Door-dash/ Skip the dishes tax summaries
19. GST/ HST number
20. Do you receive GST/ HST in the business?
21. Nature of business and industry

Your cooperation in providing these details is greatly appreciated and will ensure accurate filing. If you have any questions or need assistance, please don't hesitate to reach out.

Take care everyone!