

## RRSP & Tax Planning Information Requirements

Thank you for providing us with the opportunity in servicing your tax related needs! As a valued client, you have access to complimentary Annual RRSP and Tax Planning Services. Please note this complimentary service is **ONLY PROVIDED in the form of remote/virtual service options**, all information will be communicated electronically with our Professional Tax & Accounting Specialists.

Please keep in mind, this is an estimation of your tax implications based on the information you will provide. Under uncertainties, please provide your best estimate of the information requested below & please reference a previously filed tax year with similar circumstances to allow us to retrieve estimated figures from past tax filings.

To get the most out of this complimentary service, please complete the following:

- SECURE APPOINTMENT** to discuss the results of you RRSP and Tax Planning recommendations. Please allow 10 business days of processing time, it is RECOMMENDED to **schedule your appointment 10 business days following the submission date** of complete set of below information requirements.
  
- REVIEW & COMPLETE BELOW** Below is a list of most common income, expense, and tax credit categories. Please see [T1 Individual Tax Preparation Checklist](#) for a comprehensive listing, as well as [Statements of Activities](#) for helpful documents to help you capture the necessary information to determine your taxable income.
  1. **What are the maximum funds you have available to contribute into RRSP by the contribution deadline (End of Feb)?** \_\_\_\_\_
  2. **What is your primary concern & objective? Please select one of the following:**
    - How much RRSP must I contribute to bring my tax payable to \$0
    - How much RRSP must I contribute to achieve the maximize tax bracket efficiency
    - What will my tax balance results be if I want to maximize my contributions by contributing maximum funds available stated in #1 above & maximizing my RRSP contribution limit
    - What will my tax balance results be if I contributed \$ \_\_\_\_\_ into my RRSP
  3. **Copy of Last Year's Tax Filing, if not completed by K Liu Accounting Services Inc.**
    - Self
    - Spouse

# K Liu Accounting Services Inc.

## 4. Employment Income Details

- Copy of last pay stubs of the tax year
- Estimated Spousal Net Income

## 5. Other income and tax deducted on other income

- Farm and Business Income & Expenses
- Rental Income & Expenses
- Commission Income & Expenses
- Interest Income
- Investment Income
- RRSP Income
- Other – Please See [T1 Individual Tax Preparation Checklist](#) for More Details

## 6. Other Expenses

- Allowable Employment Expenses Deductions
- Allowable Moving Expenses
- Other – Please See [T1 Individual Tax Preparation Checklist](#) for More Details

## 7. Eligible Tax Credits

- Child Related Expenses
- Disability Tax Credit
- Donations
- First Time Home Buyer
- Medical Premiums & Expenses
- RRSP Contributions
- Student Loan Interest
- Tuition
- Union Dues
- Other – Please See [T1 Individual Tax Preparation Checklist](#) for More Details

## 8. Other Comments

# K Liu Accounting Services Inc.

- [SUBMIT ABOVE CHECKLIST & DOCUMENTS](#) through our secure File Submission Upload Portal (Click Below)



If you have any questions or concerns,  
please email or scheduled a call with us any time.  
Find our up-to-date appointment availabilities  
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