



Corporate (T2) Checklist

- Company Name and Address
- Statements for any banks/credit cards/loans reflecting balances at fiscal year end
- Receipts for any assets purchased in the year
- Copy of letters patent/articles of incorporation showing the incorporation and ownership structure
- Owner(s) full name, address, and Social Insurance Number
- Dividends paid % shares owned by each shareholder
- Meals and entertainment expenses
- T2 for prior year (*for new T2 clients*)
- Name, position + phone number for person signing the T2
- Companies main product or service
- Finalized balance sheet + profit and loss statement
- Sign off on the shareholder account balance (*if applicable*)