

Tax Document Routing Checklist

Separate tax preparation, tax-aware planning, secure document routing, and referral questions before tax slips or statements move.

BEST FOR

Tax-season, retirement-income, rental, self-employed, and document-routing questions.

USEFUL OUTPUT

A safer document route and clearer scope.

Before anything moves, make the decision visible.

Income

Tax

Portfolio

Insurance

Estate

Documents

Advisor fit

Next action

This worksheet is for preparation and conversation only. Do not enter SINs, account numbers, passwords, trade instructions, full statements, or tax slips. Confirm the secure route before sending sensitive records.

Sort the records

- Income slips, investment slips, rental records, self-employed records, and deductions
- CRA notices, carryforwards, gains, losses, and installment questions
- Retirement withdrawals, pension income, CPP/OAS, and taxable-account records

Confirm the route

- Public note: general routing only
- Phone: urgent or account-action questions
- Secure route: tax slips, statements, and personal records
- Referral: complex legal, cross-border, or specialist tax matters

Area	Question	What to clarify
Planning	Income timing, withdrawals, gains, benefits	May connect to retirement or investment decisions.
Preparation	Slips, schedules, deductions, filing records	Scope should be confirmed first.
Secure route	Sensitive files and statements	Do not send through public forms or ordinary email.
Referral	Complex tax, legal, or cross-border issues	Specialist may be required.

Notes for the first conversation

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