

Tax-Filing Readiness Checklist

Fix the books, then file with confidence

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Please work these before you file. Errors caught during cleanup are cheap to fix; the same errors caught by the CRA after filing are not. A clean base makes the T2 accurate and calm.



1

Gather your documents

Bank statements, invoices, receipts, credit card reports, payroll.



2

Enter and de-duplicate

Record every transaction; remove duplicates and omissions.



3

Reconcile all accounts

Match bank and credit card accounts to statements.



4

Classify correctly

Income and expenses in the right accounts under ASPE.



5

Check GST/HST

Confirm it is accurate and reconciled.



6

Confirm payroll

Match remittances to what was filed.



7

Support every claim

Have a document for each deduction, then sign off and file.

PRO TIP

A claim you cannot support with a document can be denied — close the documentation gap before you file.

What happens next

1

Free consultation

We scope the cleanup and set a flat fee.

2

We fix and prepare

Reconcile, correct, and ready the T2.

3

File clean

Sign off and file on an accurate base.