

Tax-Ready Checklist – Quick Reference

Monthly

- Upload and store receipts
- Categorize transactions correctly
- Reconcile bank & credit cards
- Review uncategorized items

Quarterly

- File GST/HST returns
- Confirm payroll remittances
- Review large or unusual transactions

Annually

- Review books before year-end
- Confirm capital assets & depreciation
- Organize contracts and invoices
- Retain CRA notices and tax returns

 CRA requires records be kept for at least 6 years.

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