

Financial document organiser

Alberta · Preparing financial information · Requirements depend on the issues and applicable process

Keep the three tax records separate

Return: what you filed. Assessment: the CRA's assessment after processing it. Reassessment: a later assessment following changes.

- ☐ Separate tax returns, notices of assessment and any reassessments.
- ☐ Group other records into earnings, accounts, property, debts and business interests.
- ☐ For each item, identify the person or account and the period covered.
- ☐ Keep complete copies and preserve originals.
- ☐ List missing records separately, including the period needed.
- ☐ Ask which requirements apply and what must be obtained first.
- ☐ Confirm how the firm wants sensitive documents delivered.

The document, the period, the gap

Illustrative organising categories. The issues, requests and orders determine the exact records required.

Document	What it helps explain	Relevant date or period	Common omissions to check
Complete income tax return	Income reported and the schedules supporting it.	The tax years requested; federal child-support guidance identifies the three most recent.	Only a summary page, or missing schedules.
Notice of assessment	The CRA's assessment of the filed return.	Each relevant tax year.	A return supplied without its assessment.
Notice of reassessment, if issued	Changes following an earlier assessment.	The same tax year and the date of the later notice.	Only the original assessment supplied.
Pay statements or employer letter	Current earnings, deductions and employment information.	Recent pay period and year-to-date figures where shown.	No period, missing year-to-date detail, or a changed job not explained.
Benefits, pension or other income records	Income from sources beyond employment.	The payment period and relevant annual records.	One payment screenshot with no source or period.
Bank and investment statements	Balances and transactions in the identified accounts.	The exact months or valuation dates requested.	Wrong month, missing pages or an unidentified account.
Property and mortgage records	Ownership, available valuation information and secured debt.	The date relevant to the property question.	Treating the mortgage balance as the property's value.
Credit cards, loans and other debt statements	Who owes the debt and the balance shown.	The requested statement or balance date.	Missing account holder, balance date or supporting pages.
Business and self-employment records	Income and the financial position of the business.	Relevant financial years and any requested current period.	Bank statements supplied without available financial statements or supporting records.

My document inventory

01 Document / account / person

Period requested / file available / missing information

02 Document / account / person

Period requested / file available / missing information

03 Document / account / person

Period requested / file available / missing information

Official starting points

Justice Canada: Income Disclosure for Child Support Purposes

Canada Revenue Agency: After sending us your tax return

Sources checked 21 October 2026. Use the current official materials and directions in your matter.

Read the accompanying NISI Journal article