



# 2019 Personal Income Tax Return Checklist

*Please complete and supply us with this checklist together with your tax information*

## Personal Information

☐

Returning client, no new personal information

LAST NAME	FIRST NAME	DATE OF BIRTH (MM/DD/YY)	SIN #
STREET ADDRESS			HOME #
CITY	PROVINCE	POSTAL CODE	WORK #
EMAIL ADDRESS		MARITAL STATUS	CELL #

## Spouse (if applicable)

☐

Returning client, no new personal information

LAST NAME	FIRST NAME	DATE OF BIRTH (MM/DD/YY)	SIN #
STREET ADDRESS			HOME #
CITY	PROVINCE	POSTAL CODE	WORK #
EMAIL ADDRESS		MARITAL STATUS	CELL #

**If you have dependents, please complete the above information on each dependent on a separate sheet**

- ☐ 2018 Notice of assessment/reassessment (if not already provided to us)
- ☐ 2019 tax installments paid summary, if applicable
- ☐ Amount of any contributions to or distributions from, or loans to or from foreign trusts in 2019
- ☐ Do you authorize CRA to provide information about you to Elections Canada? ☐ Yes ☐ No
- ☐ **If new personal tax client**, copy of 2016 – 2018 returns and notices of assessment, carryforward details such as donations, losses, RRSP contributions, etc., and signed copy of T1013 CRA authorization (available upon request)



# 2019 Personal Income Tax Return Checklist

## Income Slips and Documentation

- ☐ Income slips (T3, T4, T4A, T4AP, T4E, T4RSP, T4RIF, T4AOAS, T4PS, T5, T5007, T5008, T5013, T5018, RC62, others)
- ☐ Stock option/benefit plan statements from employer
- ☐ Annual mutual fund statements for all funds held outside your RRSP or RRIF
- ☐ Details of all non-RRSP and non-RRIF investment disposals during 2019, including historical information to support original purchase price (cost base) or a "realized gain/loss" report from broker
- ☐ Details of investments that were subject to 1994 capital gains election, if any
- ☐ **Do you hold investments or investment real estate property outside Canada which originally cost in excess of \$100,000 CDN (triggering the need for T1135 Foreign Income statement)?** ☐ YES ☐ NO  
**For securities held in an account with a Canadian broker, please provide the foreign income report**
- ☐ **Did you sell your principal residence in 2019?** ☐ YES ☐ NO **If yes, please provide details of original purchase and sale and number of years designated as principal residence \_\_\_\_\_ years**

## Rental Income

- ☐ Full address including postal code, number of rental units
- ☐ Revenue and expenses, including mortgage interest (not principal)
- ☐ Percentage of personal use, if applicable
- ☐ If bought or sold in 2019, provide purchase/sale agreement, statement of adjustments, reporting letter from lawyer and allocation of value between land and building.

## Self-Employment Income

- ☐ Revenue for the year and expenses (see below), on an accrual basis
- ☐ FIT or MICROFIT details and contract
- ☐ HST return(s), if applicable for the year. Do you want us to prepare and file this return ☐ YES ☐ NO  
**If yes, please provide HST number and access code/HST return**



# 2019 Personal Income Tax Return Checklist

## Expenses (Self-employment, Employment or Commission)

- ☐ T2200 – conditions of employment form signed by employer
- ☐ All non-reimbursed expenses: travel, promotion, conferences, dues, telecommunications, supplies, meals and entertainment, etc.
- ☐ Automotive: kilometers used for business and total kilometers driven for year, gas, repairs and maintenance, insurance, license, lease costs, loan interest, purchase/sale details if bought/sold in 2019
- ☐ Office-in-home: percentage used for business, rent, property taxes, condo fees, utilities, insurance, repairs and maintenance

## Deductions

- ☐ RRSP contribution receipts, including January and February 2020 receipts
- ☐ Childcare, with supporting receipts and SIN of caregiver(s)
- ☐ Adoption costs
- ☐ Union/membership dues
- ☐ Moving expenses (contact us for detailed list)
- ☐ Alimony/support payments, with copy of agreement if first year claim
- ☐ Legal fees to collect salary, alimony or support
- ☐ Accounting fees, investment counsel fees
- ☐ Investment interest expense
- ☐ Tax shelter deductions – tax slips and tax reporting package
- ☐ Trades people's tools
- ☐ Clergy residence deduction
- ☐ **Split pension income, if advantageous?**
  - ☐ YES
  - ☐ NO

## Tax Credits

- ☐ Charitable and political donation receipts
- ☐ Medical/dental expenses (**get annual printout from pharmacy, dentist**)
- ☐ Attendant Care expenses
- ☐ Expenses for care of dependent relative(s)
- ☐ Tuition fee receipt (T2202), with dependent's income and signature(s)
- ☐ Disability credit form (T2201) for self or dependent for first-time claims
- ☐ Student loan interest statement
- ☐ 2019 rent/property tax information if eligible for Ontario tax credits
- ☐ Indicate if eligible for first-time home buyers credit for 2019
- ☐ Indicate if family member (other than child) resides with you or is dependent on you
- ☐ Receipts for home renovations to improve accessibility (seniors or disabled persons)
- ☐ Educator school supplies expenses