



**2019 Personal Tax Checklist**

**Personal Information (Please update if there are changes over the past year)**

<b>Name</b>		<b>Spouse Name</b>	
<b>SIN #</b>		<b>SIN #</b>	
<b>Address</b>		<b>Address</b>	
<b>City</b>		<b>City</b>	
<b>Postal Code</b>		<b>Postal Code</b>	
<b>Home #</b>	(    )	<b>Home #</b>	(    )
<b>Office #</b>	(    )	<b>Office #</b>	(    )
<b>Cell #</b>	(    )	<b>Cell #</b>	(    )
<b>Date of Birth</b>		<b>Date of Birth</b>	
<b>Email Address</b>		<b>Email Address</b>	
<b>Marital Status</b> (Married/Common-law, Single, Separated, Divorced, Widowed)		<b>Marital Status</b>	

**Dependant Information**

	<b>1</b>	<b>2</b>	<b>3</b>
<b>Name</b>			
<b>SIN #</b>			
<b>Date of Birth</b>			
<b>Relationship</b>			

Please provide information for additional dependants on a separate sheet

**General Items**

- Copy of last year's tax return (not required for returning clients)
- Copy of spouse's tax return (not required for returning clients)
- Copy of any foreign tax return filed (U.S. citizens must file U.S. returns)
- 2018 Notice of Assessment
- Other years' reassessments received in the current year
- Note consenting to provide your income tax information to Elections Canada
- Installment payments made, if any
- Details of foreign property holdings (if any)
- Contact details & consent to discuss your investments with any advisors
- Details of lawsuits settled in 2019
- Support & settlement details resulting from matrimonial changes, if any
- TFSA statements
- Direct deposit information, if desired or bank changed
- Details of new primary residence purchase

## Income Details (If applicable)

- Employment income (T4)
- Pension income (T4A, T4A(P), T4RIF, T4RSP)
- U.S. social security & any other foreign pensions
- Old age security (T4OAS)
- Investment income (T5)
- Income from trusts such as mutual fund investments (T3)
- Income from employment insurance (T4E)
- Income from partnerships (T5013)
- Workers compensation/social assistance payments (T5007)
- Details of the sale of securities such as stocks & bonds (e.g. realized gain/loss report from your broker), possible T5008 slips
- Details of real estate sales & purchases
- Income from foreign investments
- Spousal support payments received
- T4As for any miscellaneous income received during the year
- T4PS (profit sharing)

## Deductions – Employees

- Trades people & apprentice tool purchases, if eligible
- Declaration of conditions of employment form (T2200)
- TL2 meals & lodging for transportation employees
- Expenses not reimbursed by your employer
- Office rent if required as a condition of employment
- Home office expenses
- If you are a commissioned salesperson, details supporting advertising expenses, promotion, meals & entertainment

## Deductions – Motor Vehicles (If self-employed)

- Total kilometers driven & kilometers driven just for work
- Details of total expenses
- New vehicle, purchase invoice/agreement

## Deductions – General

- RRSP contributions
- Medical, dental, prescription drugs, nursing home expenses
- Payments to a private health insurance plan
- Charitable donations
- Tuition fees/education amount (T2202A for Canadian & TL11 for foreign universities) for yourself or transferred from a dependent, signed by student

- Interest paid on student loans
- Professional dues & insurance, union dues
- Interest on loans assumed to purchase investments
- Professional consultant fees
- Legal fees paid to establish child or spousal support or to enforce a pre-existing agreement
- Legal fees paid to recover wages from your employer
- Details of people you support & their medical status
- Child care receipts (if for camp, list dates attended)
- Non-reimbursed moving expenses if you moved 40 km or closer to a new work space location
- Property taxes or residential rent paid & to whom
- Ontario health home renovation costs incurred by those 65 & older
- Political contributions receipts
- Disability tax credit claim form completed by authorized health practitioner
- Spousal support payments paid
- Adoption expenses

## Unincorporated Businesses

- Software backup of bookkeeping records, if computerized (include password)
- Manual bookkeeping records
- Total sales revenue or receipts for the year, if books not kept
- Total expenses listed by category for the year or receipts, if books not kept
- Capital assets acquired (e.g., computers & peripherals, furniture & equipment)
- Home office expenses
- Partners' names, addresses, SINS & per cent interest

## Rental Properties

- Address & number of units
- Rental income by unit
- Rental expenses by unit & by category of expense

**If there are any previous years unclaimed receipts, please identify them separately and we can adjust those years' returns with Canada Revenue Agency.**

**Additional fees will apply for Adjustments to previous tax**