

2019 PERSONAL INCOME TAX CHECKLIST

Please review this checklist and where applicable, provide the necessary slips or information to our office in person or by mail or by email.

If you are unsure of having received all your documentation, please refer to the following issue dates for common tax forms.

February 29, 2020:	T4, T4A, T5, T4RSP, T4RIF, T101
March 31, 2020:	T3, T5013

Important: Provide a copy of your prior year **NOTICE OF ASSESSMENT** and, where applicable, a copy of the latest Instalment Payment Summary.

Questions:

1. Are you a Canadian citizen? Yes No
2. Would you like CRA to provide information to Elections Canada? Yes No
3. Do you want to receive notifications from CRA by email? No personal/confidential information will be transmitted by email. The email notification will be a generic message prompting you to log in to your personal account to view correspondence – including notices of assessment – on CRA’s website. Yes No
4. At any time in 2019, did you own non-Canadian property (real estate that you rented to others, investment accounts, shares in non-Canadian companies, etc.) with a total cost amount of more than C\$100,000? Yes No
5. If your marital status changed during the year, please indicate the date of change: _____
6. Please ensure we have the full names and dates of birth for all children or dependants, and SINs if applicable: _____

7. If you have a spouse or common-law partner and we are not preparing his/her return, please provide the following: Spouse’s Name: _____
Spouse’s SIN: _____
Net income from line 236 of spouse’s income tax return: _____

NEW CLIENTS: (please complete the following if you are a new client)

Taxpayer Name: _____ Taxpayer Birth Date: _____

Taxpayer Marital Status: Married Common-Law Separated Divorced Widowed Other (Specify) _____

If applicable:

Spouse’s Name: _____ Spouse’s Birth Date: _____

EMPLOYMENT INCOME

Commission income	T4A
Employment income and benefits	T4 and details of benefits
Bonus or other supplementary pay	T4
Payments from DPSP or profit sharing plan	TRA/T4PS
Severance pay or retirement allowance	T4A
Tips, casual wages or part-time salary	T4, T4A or pay slip or summary showing amount received

RETIREMENT INCOME

Old Age Security	T4A(OAS)
Canada Pension Plan	T4A(P)
Disability benefits	T4A(P)
Other pension or superannuation	T4A
Foreign pension income	Foreign jurisdiction reporting slip / withholding tax details
RRSP annuity income	T4RSP
RRIF annuity income	T4RIF
Other annuity income	T4A
Split pension income	

OTHER INCOME

Employment insurance benefits	T4E
Dividend income	T5
Interest income	T5
Foreign income	Foreign jurisdiction reporting slip / withholding tax details
Partnership income: limited or non-active partners	T5013
Rental income/loss	Statement of Rental Income and Expenses or Form T776
Capital gains/losses	Purchase/disposition details (T5/T3 slips, broker statements)
Principal residence disposition	Details including year of acquisition, proceeds of disposition, property address
Alimony/support payments	Amount received
Income from a trust/mutual fund	T3 Details of income and cost base adjustments
Canada Savings Bond /other bond interest	T600 / other
Annuity income	T4A
Patronage allocation – Co-op/UFA	T4A
Farm support payments	AGR-1
Other income / royalty income	T5
Worker's Comp/Social Assistance (non-taxable)	T5007
Universal Child Care Benefit	NA

SELF-EMPLOYMENT INCOME

Business income	Details of all income and expenses or Form T2125
Professional income	Details of all income and expenses or Form T2125
Partnership income	Statement of partnership income and allocation or T5013
Commission (self-employed)	Details of all income and expenses

Farming	Details of all income and expenses or NISA Form
Joint venture	Joint venture statements

DEDUCTIONS

RRSP	Official contribution receipts
RRSP rollovers or withdrawals	Details – also inform us of Home Buyer Plan information
Annual union, professional or like dues	T4 or receipts
Child care expenses	Details of payment / SINs where applicable
Business investment loss	Details of disposition and/or uncollectibility
Moving expenses	Details / T1M
Alimony / support payments	Name & address of payee; if first year, copy of agreement
Carrying charges and investment expenses	Details
Tax shelter write-offs, flow-throughs	T5013, T101
Employment-related expenses	Details
Other deductions	Details

TAX CREDITS

Spousal credit	Details of net income for spouse
Equivalent-to-spouse credit	Details including net income for spouse equivalent
Dependent credit	Details including net income for each dependent
Disability credit	Details, if 1st year, T2201
Tuition and education credit	T2202
Interest paid on student loans	Details
Medical credit	Official medical receipts
Donation credit	Official donation receipts
Political credit (Federal or Provincial)	Official political donation receipts
Share purchase credit / investment tax credit	Details of eligible property / T2038
Labor sponsored funds credit	T5006
Home buyer's tax credit	Details if acquired qualifying home (i.e.2019 closing date)

OTHER

Instalments	Instalment payments summary (final for current year)
Notice of (Re)Assessment issued in the year	Notice of Assessment / Notice of Reassessment
GST / HST form	Please send to us if you would like us to prepare return

Comments / list of items to be sent at a later date:
