

2018 Personal Income Tax Checklist

In order to assist us in preparing your 2018 Personal Income Tax return(s) kindly complete the following:

Personal Information:

Name _____
 Name _____
 Name _____
 Name _____

Address: Same as last year
 New (please complete):

Marital Status:

Same as last year
 Changed as of (date): _____

New marital status (if applicable):

Married Common-law
 Separated Divorced
 Widowed Single

Contact Information:

Home Phone: _____
 Business Phone: _____
 Cell Phone: _____
 Email: _____

Preferred Contact Method:

Home Phone Business Phone
 Cell Phone Email

Dependant Information:

Same as previous year
 New (please complete chart)

Name	Date of Birth	SIN	Relationship	Net Income	Return to Be Prepared
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No

Are you a Canadian Citizen? Yes No

If yes, do you authorize Canada Revenue Agency to give your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors? Yes No

Did you own foreign property at any time in 2018 with a cost of over \$100,000 CDN? (If yes, attach details of such property) Yes No

Continued on Reverse...

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Please include the following information for each taxpayer:

(If applicable, please check box (✓) if the information is included)

Copy of 2017 Notice of Assessment and prior years' Reassessment Notices (if applicable)

All income information slips

Employment T4 T4A
Partnership income T5013
Pension payments from employer T4A
Interest and dividends T5
Mutual fund and other trusts T3
Old Age Security T4A (OAS)
Canada Pension Plan T4A (P)

Employment Insurance T4E
Income from RRSP T4RSP
Income from RRIF T4RIF
Purchase and sale of securities T5008
Social assistance, WSIB T5007
Other (specify) _____

All official receipts:

RRSP contributions, including
first 60 days of 2019
Charitable donations
Political donations
Professional dues

Disability credit T2201
Education credit T2202/2202A¹
¹If receipt is from a dependant, please have dependant sign in appropriate place on the form (reverse). If we are not completing dependant's return, please complete the income portion of the form

- Self-employment income and expenses (Include HST/GST information, if applicable)
- Rental property income and expenses
- Details of employment expenses (Employees must attach form T2200 signed by their employer)

Other items:

- Support/alimony payments (Please include amount paid or received, the name, address and SIN of payee or recipient, and the date of support agreement)
- Child care expenses (Please include receipts)
- Moving expenses (Please include receipts)
- Medical expenses (Please include official receipts)
- Property taxes or rent paid in the year (Please include the number of months at each location, the address of each location and to whom the amounts were paid, i.e. landlord, municipality)
- Instalment payments made during the year (Please include year end statement from CRA)
- Home accessibility expenses (You may be eligible for certain tax credits if you are 65 or older or living with someone who is 65 or older or you qualify for the disability tax credit and have done improvements to your home to improve the safety and accessibility of your home. Please contact us for more information.)

- Carrying charges and interest paid to earn income from investments
- Other Credits: Interest paid on student loans and, tradesperson's tools expenses &/or teaching supplies expenses (for educators only)
- Details of disposition of stocks, bonds and mutual funds. (Please include investment broker monthly statements and year end summaries provided by broker)
- Disposition of real estate including your principal residence (Please include proceeds of sale, sale date, and ownership. For sales of property other than a principal residence please also include purchase date and original cost)
- Direct Deposit (Please include a void cheque for direct deposit if desired, unless already registered)