

PERSONAL INCOME TAX CHECKLIST – 2018

To prepare your tax return, we will need the following information and documents as they apply to you:

INCOME

DOCUMENTS

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|---|---|
| <input type="checkbox"/> Salaries, wages, commissions, fees, allowances | T4, T4A |
| <input type="checkbox"/> Pensions | T4A, T4AP, T4A(OAS), T4(RIF),
T4A (RCA) |
| <input type="checkbox"/> Social Assistance/WSIB | T5007 |
| <input type="checkbox"/> EI Benefits | T4E |
| <input type="checkbox"/> Investments – Interest, Dividends, Foreign Income | T5, T4PS, T600, T3, T5008, T5013 |
| <input type="checkbox"/> Capital Gains and Losses | Buy/Sell slips, T3, T4PS, T5, Broker
Summaries |
| <input type="checkbox"/> Rental Income | Income and expenses |
| <input type="checkbox"/> Alimony, child support or separation allowances | Amount |
| <input type="checkbox"/> Registered Retirement Savings Plan Income | T4RSP |
| <input type="checkbox"/> Other Income (retiring allowances,
scholarships etc.) | T4A, Listing of Income |
| <input type="checkbox"/> Income and Expenses from Self Employment | Listing, receipts or financial
statements |
| <input type="checkbox"/> Universal Child Care Benefit | RC62 |

DEDUCTIONS and CREDITS

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|--|-------------------------------|
| <input type="checkbox"/> Allowable employment expenses (auto, travel etc.) | T2200 from employer, receipts |
| <input type="checkbox"/> R.R.S.P. contributions | Official receipts |
| <input type="checkbox"/> Use of Home Buyers' Plan | Revenue Canada statement |
| <input type="checkbox"/> Union or professional dues | Official receipts |
| <input type="checkbox"/> Tuition fees | T2202A or TL11 |

- | | |
|---|--|
| <input type="checkbox"/> Child care expenses | Receipts including name, address and social insurance number of payee |
| <input type="checkbox"/> Investment carrying charges – loan interest for investments, safe custody fees, accounting fees, investment counsel fees | Receipts |
| <input type="checkbox"/> Moving expenses (job related move) | Receipts |
| <input type="checkbox"/> Alimony or child support paid | Name and address of recipient and receipts or cancelled cheques |
| <input type="checkbox"/> Tax shelter investments | T101, T102, T5013 |
| <input type="checkbox"/> Medical expenses for any twelve month period ending in 2018 | Receipts or annual printout from your pharmacy or dentist and annual printout from your insurance provider |
| <input type="checkbox"/> Charitable donations | Receipts |
| <input type="checkbox"/> Tuition fee transfers | T2202 or T2202A Tuition receipt |
| <input type="checkbox"/> Ontario Property Tax Credit | Rent receipt from landlord; or for property taxes, receipt |
| <input type="checkbox"/> Income tax installments | Amount and receipts |
| <input type="checkbox"/> Special Tax Credits | Political contribution, T2038(IND) |
| <input type="checkbox"/> Student loan interest | Receipts |

PERSONAL EXEMPTIONS (DEPENDENTS)

- Did your marital status change during the year? Provide date.
- Are you living in a common law relationship?
- Were any children born to you or your spouse during the year? Provide copy of birth certificate, date of birth and if you have it social insurance number for your child.
- Did you support any other dependents during the year? (if non resident only spouse and children may be claimed).

- Were you or a dependent disabled during the year? (impairment must have lasted or be expected to last for more than one year). Complete Form T2201 and provide caregiver receipts.
- If you began to pay child or spousal support or renegotiated your child or spousal support payments in the tax year, please provide a copy of the agreement.
- Did any of your children begin college or university in the tax year? If they did not live at home or in residence, please provide a receipt detailing landlord, address and amount.

OTHER

- Did you move? Please provide address and telephone number.
- If you purchased your first home in 2018, provide your Statement of Adjustments so that you may apply for the First Time Home Buyer's Credit.
- Your E mail address and current contact information.
- Notice of Assessment and for new clients, last year's Income Tax Return.
- Do you want Direct Deposit? If yes provide void cheque.
- Do you want to authorize the Canada Revenue Agency to provide Elections Canada with your name, address and birth date to allow Elections Canada to update the National Register of Elections?
- Do you own or did you hold Foreign Property at any time in the tax year with a total value of more than \$100,000 Canadian?
- Did you sell any real estate including your principal residence during the tax year? We will require all details of the transaction including legal documents from the purchase and sale.