

## 2019 PERSONAL TAX INFORMATION CHECKLIST

### 1. PERSONAL INFORMATION

Did you move house during the year? *[yes/no]*: \_\_\_\_\_

Do you authorize Revenue Canada to provide your name, address and date of birth to Elections Canada for the purpose of updating the National Register of Electors? *[yes/no]*: \_\_\_\_\_

***Please complete in full:***

Name

\_\_\_\_\_  
*[First name, middle initial, last name]*

Address

\_\_\_\_\_

City/Prov

Postal Code

\_\_\_\_\_

Telephone (home)

Telephone work

E-mail (home) \_\_\_\_\_

SIN \_\_\_\_\_

Birthdate *dd /mm/yy* \_\_\_\_\_

Marital Status \_\_\_\_\_

Occupation \_\_\_\_\_

\_\_\_\_\_

### 2. SPOUSE (including common-law)

Name

Birthdate [dd/mm/yy]

Net Income (line 236)\*

SIN

\_\_\_\_\_

If marital status changed during the year, enter date of change: \_\_\_\_\_



**3. DEPENDENTS (children and others dependent on you for financial support)**

<u>Name</u>	<u>Relationship</u>	<u>Birthdate [dd/mm/yy]</u>	<u>Net Income (line 236)*</u>	<u>SIN</u>

- Provide details of income and deductions only if we are not preparing the tax return.



**4. INFORMATION T-SLIPS**

**Attached**

*These are the standard prescribed forms on which income is reported:*

**Employment income**

Employment/commission income	<b>T4, T4A</b>	_____
Director's fees	<b>T4, T4A</b>	_____
Employee profit sharing	<b>T4PS</b>	_____

**Pension/retirement income**

Pension/annuity income	<b>T4A</b>	_____
Old Age Security	<b>T4A(OAS)</b>	_____
Canada Pension Plan benefits	<b>T4A(P)</b>	_____
Income from RRSP or RRIF	<b>T4RSP, T4RIF</b>	_____

**Investment income**

Interest & dividends	<b>T5</b>	_____
Mutual funds and other trusts	<b>T3</b>	_____
Canada Savings Bonds	<b>T600</b>	_____

**Other sources**

Partnership income	<b>T5013</b>	_____
Employment insurance benefit	<b>T4E</b>	_____
Purchase and sale of securities	<b>T5008</b>	_____

Tax shelters **T101, T5013**

**Employment Expenses** **T2200**

Other (specify) \_\_\_\_\_



## 5. OFFICIAL RECEIPTS

*Please provide the official receipts/forms received for these deductions/credits:*

**For self only:**

RRSP contributions (including repayments under the Home Buyers Plan) \_\_\_\_\_

Charitable donations (provide details for in-kind donations, such as shares of stock) \_\_\_\_\_

Political donations \_\_\_\_\_

Professional/union dues \_\_\_\_\_

**For self and dependents:**

Medical expenses (including attendant, nursing and nursing home care) \_\_\_\_\_

Tuition fees\* **T2202/2202A** \_\_\_\_\_

Disability tax credit **T2201** \_\_\_\_\_

- Dependent must sign the form if the credit is being transferred to a supporting person.

Rent paid in Ontario



## 6. INVESTMENTS

- **Interest and other carrying charges** paid to earn income from investments (including safety deposit box, accounting, and investment counsel fees). \_\_\_\_\_
  
- **Gains or losses** from selling securities or other capital property—e.g. stocks, bonds, mutual funds, real estate (including statements of trading summaries, original cost and transaction fees). \_\_\_\_\_
  
- Detailed listing of income and expenses from **rental properties**, on a property by property basis (indicate ownership split). \_\_\_\_\_
  
- Details regarding your interest in property held outside Canada (i.e. **foreign property**) –including bank accounts, investments, U.S. securities, trusts and real estate. (***Please consult me if you are unfamiliar with the reporting requirements***) \_\_\_\_\_
  
- Details regarding the sale of your **PRINCIPLE RESIDENCE** : Complete address; date of purchase; purchase price; date of sale; sale price \_\_\_\_\_



**7. OTHER DEDUCTIONS/TAX CREDITS**

- Details regarding **child care expenses**, including the name and social insurance number of any individual providing care (for children 16 & under). \_\_\_\_\_
  
- The amount of **alimony, maintenance or child support** paid or received in the year and the name and address of the recipient, if applicable. \_\_\_\_\_
  
- Details regarding **income tax instalment** payments made during the year (include recent Revenue Canada Statement of Account or cancelled cheque-s). \_\_\_\_\_
  
- Also include complete details regarding any of the following:
  - **Home Buyers Plan withdrawals or repayments** \_\_\_\_\_
  - **Lifelong Learning Plan withdrawals or repayments** \_\_\_\_\_
  - **Moving expenses** \_\_\_\_\_
  - **Legal fees** \_\_\_\_\_
  - **Property taxes or rent** \_\_\_\_\_
  - **Interest paid on student loans** \_\_\_\_\_

**ALSO INCLUDE (for NEW clients):**

- 2018 Notice of Assessment/ Reassessment
- Copy of 2018 personal tax return (if you are a first year client).

## 8. SELF-EMPLOYMENT OR UNINCORPORATED BUSINESS

**EMPLOYMENT EXPENSES** (Complete ITEMS 9, 10, 11) AND ATTACH A T2200

Registered business name:

Partnership [yes/no]:

Date business commenced [mm/yy]:

Fiscal year-end [dd/mm/yy]:

GST/HST registered [yes/no]:

Business #:

**Attached**

- Summary of income and expenses by category [**Complete page 5-7**] \_\_\_\_\_
- Detailed listing of capital assets purchased or disposed of during the year (including furniture, equipment, computers). \_\_\_\_\_
- Detailed listing of GST/HST collected on receipts and GST/HST paid on disbursements, including copies of any GST/HST returns filed (or not filed) and installments paid. \_\_\_\_\_
- List of revenue billed at year-end, but not collected ("accounts receivable"). \_\_\_\_\_
- List of expenses owing at year-end, but not paid ("accounts payable"). \_\_\_\_\_

**9. SELF EMPLOYED or UNINCORPORATED BUSINESS (EMPLOYEES: USE CATEGORIES BELOW FOR EMPLOYMENT EXPENSES AND ATTACH A T2200)**

**Statement of income and expenses**

GST/HST/HST

**Income**

Sales, commissions, or fees  
(excluding GST/HST)

\_\_\_\_\_

GST/HST/HST collected on sales

\_\_\_\_\_

Are you using the GST/HST Quick Method (Y/N)? \_\_\_\_\_

**Expenses**

TOTAL \*

GST/HST  incl.  excl.

Cost of goods sold

\_\_\_\_\_

\_\_\_\_\_

Advertising

\_\_\_\_\_

\_\_\_\_\_

Bad debts

\_\_\_\_\_

\_\_\_\_\_

Business tax

\_\_\_\_\_

\_\_\_\_\_

Licenses, dues, memberships

\_\_\_\_\_

\_\_\_\_\_

Delivery, freight, courier

\_\_\_\_\_

\_\_\_\_\_

Insurance

\_\_\_\_\_

\_\_\_\_\_

Interest

\_\_\_\_\_

\_\_\_\_\_

Maintenance and repairs

\_\_\_\_\_

\_\_\_\_\_

Management and admin. fees

\_\_\_\_\_

\_\_\_\_\_

Meals and entertainment (total)

\_\_\_\_\_

\_\_\_\_\_

Office expenses

\_\_\_\_\_

\_\_\_\_\_

Supplies

\_\_\_\_\_

\_\_\_\_\_

Legal, accounting and other professional fees

\_\_\_\_\_

\_\_\_\_\_

Rent

\_\_\_\_\_

\_\_\_\_\_

Salaries, wages, and benefits	_____	_____
Travel	_____	_____
Telephone	_____	_____
Other (provide details)	_____	_____
	_____	_____
	_____	_____

\* If you are using the GST/HST Quick Method, or you have not tracked GST/HST separately, show expenses *including* the GST/HST.

If you are claiming input tax credits (ITCs) *and* you have tracked GST/HST separately, then show expenses *excluding* GST/HST, and record related GST/HST paid in the column to the right.



**10.AUTOMOBILE EXPENSES:** (provide total expense where applicable for each vehicle used for business purposes during the year)

	Vehicle 1	Vehicle 2
Make of vehicle	_____	_____
Date of acquisition	_____	_____
Date of disposition (if in the year)	_____	_____
Cost before GST/HST	_____	_____
Km driven for business	_____	_____
Km driven in year (total)	_____	_____
<b>Total expenses incurred:</b>		
Monthly lease cost	_____	_____
Fuel and oil	_____	_____
Maintenance and repairs	_____	_____
Insurance	_____	_____
License and registration	_____	_____
Interest	_____	_____
Auto club (CAA)	_____	_____
Car washes	_____	_____
Parking	_____	_____
Other (provide details)	_____	_____



**11. WORK SPACE IN THE HOME:** (provide total expense where applicable)

*NOTE: restrictions apply and vary depending on whether you are self employed or a commissioned salesperson.*

- **Work space in the home** expenses: (provide total expense where applicable)

Office area (sq.ft.): \_\_\_\_\_

Total area (sq.ft.): \_\_\_\_\_

Mortgage interest \_\_\_\_\_

Property taxes \_\_\_\_\_

Insurance \_\_\_\_\_

Rent \_\_\_\_\_

Heat \_\_\_\_\_

Electricity \_\_\_\_\_

Water \_\_\_\_\_

Repairs and maintenance \_\_\_\_\_

Security \_\_\_\_\_

Landscaping/snow removal \_\_\_\_\_

Other (provide details)



12. SALE OF PRINCIPLE RESIDENCE

1. Did you sell a principle residence during the year 2019?

YES \_\_\_\_\_ NO \_\_\_\_\_

2. If yes, provide the following:

a) Address:

b) Year of Acquisition:

c) Proceeds of Disposition:  
(Sale price, less: legal, real estate fees, etc)

3. Details of ownership of property:

- Provide names and percentage ownership of all parties on legal title:

% ownership