

2018 PERSONAL INCOME TAX RETURN CHECKLIST

Today's Date: _____ Pickup Date: _____ Accounting Fees: \$ _____

Preparing: Current Year Multiple Years _____

PERSONAL INFORMATION New Client Returning Client – No new personal information.

NAME	DATE OF BIRTH (MM/DD/YY)	SIN #
ADDRESS (UNIT #, STREET, CITY, PROVINCE, POSTAL CODE)		
Did you sell your principal residence in 2018? <input type="checkbox"/> YES (Please provide details/documents for purchase and sale) <input type="checkbox"/> NO <i>NOTE: Penalties applicable if not reported.</i>		
PHONE #	EMAIL ADDRESS	
MARITAL STATUS		
<input type="checkbox"/> SINGLE <input type="checkbox"/> MARRIED <input type="checkbox"/> COMMON – LAW <input type="checkbox"/> SEPARATED <input type="checkbox"/> DIVORCED <input type="checkbox"/> WIDOWED If marital status has changed during the year, provide the date of change (MM/DD/YY): _____ SPOUSE'S NAME: _____ DATE OF BIRTH (MM/DD/YY): _____ SIN #: _____ NET INCOME (IF WE ARE NOT PREPARING TAX RETURN): \$ _____		
RESIDENCE (PLEASE CHECK THE ONES THAT APPLY TO YOU)		
<input type="checkbox"/> CANADIAN CITIZEN <input type="checkbox"/> RESIDENT (PR, ETC.) <input type="checkbox"/> U.S. CITIZEN/GREEN CARD HOLDER		
Did you <input type="checkbox"/> immigrate or <input type="checkbox"/> emigrate to/from Canada during the past 10 years? <input type="checkbox"/> YES (MM/DD/YY): _____ <input type="checkbox"/> NO		
Province of Residence on December 31, 2018: _____ If you are a Canadian Citizen and/or resident, would you like CRA to provide your contact information to Elections Canada to update their voter's list? <input type="checkbox"/> YES <input type="checkbox"/> NO		
Did you own foreign assets at any time in 2018 with a total cost of more than \$100,000.00? <input type="checkbox"/> YES (Please provide details of ownership of foreign assets and transactions with foreign entities.) <input type="checkbox"/> NO <i>NOTE: Penalties applicable if not reported.</i>		

DEPENDANT'S INFORMATION

NAME	DATE OF BIRTH (MM/DD/YY)	SIN #	RELATIONSHIP TO YOU	NET INCOME (IF APPLICABLE)	ARE WE PREPARING THE TAX RETURN? <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

EMPLOYMENT INCOME

<input type="checkbox"/> T4	Employment Income and Benefits
<input type="checkbox"/> T4A	Commission Income/Severance Pay/Retirement Benefits
<input type="checkbox"/> TRA/T4PS	Payments from Profit Sharing Plan

RETIREMENT INCOME

<input type="checkbox"/> T4A	Pension/Retirement/Annuity
<input type="checkbox"/> T4A(OAS)	Old Age Security
<input type="checkbox"/> T4A(P)	Canada Pension Plan/Disability
<input type="checkbox"/> T4A-RCA	Retirement Compensation Income
<input type="checkbox"/> T4RIF	RRIF Annuity Income
<input type="checkbox"/> T4RSP	RRSP Annuity Income
<input type="checkbox"/> Foreign Pension	Foreign Jurisdiction Reporting Slip/withholding tax details

INVESTMENT INCOME

<input type="checkbox"/> T3	Estates/Trusts/Mutual Funds
<input type="checkbox"/> T4PS	Income from Profit Sharing Plans
<input type="checkbox"/> T5	Dividends/Interests/Capital Gains
<input type="checkbox"/> T5008	Income from Securities Transactions
<input type="checkbox"/> T5013/T5013A	Partnership Income

Please provide copies of broker's statements /summaries as of Dec. 31, 2018.

OTHER INCOME

<input type="checkbox"/> T4E	Employment Insurance Benefits
<input type="checkbox"/> T5007	Worker's Compensation/Social Assistance (Non - Taxable)
<input type="checkbox"/> Foreign Income	Foreign Jurisdiction Reporting Slip/withholding tax details
<input type="checkbox"/> Alimony/Support Payments	Please provide amount received

***SELF-EMPLOYMENT INCOME**

<input type="checkbox"/> Business Income	Provide Summary of Income and Expenses
<input type="checkbox"/> Rental Income	Provide Rental Property Details (Address, % of Ownership, Dates of Acquisition and Disposal of Fixed Assets) and Summary of Rental Income and Expenses
<input type="checkbox"/> GST/HST Form/Access Code	If you would like us to prepare your GST Return

***Worksheets**

to assist you with these are available. Ask us.

DEDUCTIONS AND TAX CREDITS

<input type="checkbox"/> RRSP Contribution Slips	RRSP
<input type="checkbox"/> RRSP Rollovers /Withdrawals	Provide details. Also inform us of Home Buyer Plan Information if applicable
<input type="checkbox"/> Union, Professional or Like Dues	Receipts
<input type="checkbox"/> Child Care Expenses	Provide receipts and/or details, including SIN's where applicable
<input type="checkbox"/> Moving Expenses	Provide receipts and/or details
<input type="checkbox"/> Dependent Credit	Provide details including net income for each dependant
<input type="checkbox"/> Disability Credit	Provide details and T2201 if first year claiming
<input type="checkbox"/> T2200	Declaration of Employment Conditions. Provide details of employment expenses
<input type="checkbox"/> T2202	Tuition for yourself, spouse and dependents
<input type="checkbox"/> Interest Paid on Student Loans	Provide details/supporting documents
<input type="checkbox"/> Medical Credit	Medical Receipts for yourself, spouse and dependents
<input type="checkbox"/> Donations Credit	Official Donation Receipts
<input type="checkbox"/> First Time Home Buyer Tax Credit	Provide details

FOR NEW CLIENT

<input type="checkbox"/> 2017 Personal Tax Return
<input type="checkbox"/> 2017 Notice of Assessments & any Notice of Reassessments for other years if received in 2018
<input type="checkbox"/> 2018 Income Tax Installments, if applicable
<input type="checkbox"/> VOID Cheque if direct deposit information has changed

ADDITIONAL NOTES/COMMENTS:
