

PERSONAL INCOME TAX CHECKLIST - 2018

NAME: _____

ADDRESS: _____

TELEPHONE: _____

OTHER: _____

EMAIL: _____

Please check the appropriate boxes, provide details where necessary and return the completed copy, together with the documentation to our office. In this checklist, we are requesting only those receipts, forms and statements that are required to be filed with the tax return. However, Canada Revenue Agency expects documentary support for all deductions taken and may audit all or some of those other receipts or documents after the return has been filed at an additional cost.

INCOME	DOCUMENTATION REQUIRED	# OF ITEMS	N/A
1. Salaries, wages commissions, fees, allowances	T4, T4A		
2. Pensions	T4A,T4AP,T4A(OAS),T4(RIF)		
3. EI Benefits	T4E		
4. Investments: Interest, Dividends, Foreign Income	T5,T4PS,T600, T3, T5008, T5013		
5. Capital Gains & Losses (Year End Reports)	Buy-Sell slips, T3, T4PS, T5		
6. Rental Income	T5013/Income & Expenses		
7. Alimony, child support or separation allowances	Amount		
8. Registered Retirement Savings Plan Income	T4RSP		
9. Other income (retiring allowances, scholarships etc.)	T4A, Listing of Income		
10. Income and Expenses from Self Employment	Listing or Financial Stmt., T5018		
11. Universal Child Care Benefit	RC62		

DEDUCTIONS & CREDITS	DOCUMENTATION REQUIRED	# OF ITEMS	N/A
11. Allowable employment expenses (auto,travel etc.)	T2200, Receipts		
12. R.R.S.P. contributions	Official Receipts		
13. Did you purchase a home using R.R.S.P. funds?	Revenue Canada Statement		
14. Union, professional dues	Official Receipts		
15. Tuition Fees	Official Receipts T2202A, TL11		
16. Child Care Expenses-name,address,SIN of payee	Receipts		
17. Investment carrying charges, loan interest for investments, safe custody fees	Receipts Receipts		
Accounting Fees, investment counsel fees.	Receipts		
18. Moving Expenses (job related move)	T1M/Receipts		
19. Alimony, child support paid	Amount/SIN & Name and address		
20. Tax Shelter investments	T101,T102,T5013		
21. Medical Expenses-for any 12 month period	Receipts		
22. Charitable Donations/Political Contributions	Receipts		
23. Other Deductions	Complete Details		
24. Tuition fees deducted Student or supporting parent	T2202, T2202A Tuition Receipt		
25. Ontario Property Tax Credit (Rent Paid & Taxes Pd)	Name of landlord, Municipality Amount		
26. Income Taxes paid in Instalments	Receipts		
27. Special Tax credits	Adoption Expenses, T2038(IND)		
28. Student Loan Interest	Receipts		
29. Adoption Expenses	Receipts		
30. Payments for IVF Treatments	Receipts		

SEE REVERSE

PERSONAL EXEMPTIONS (DEPENDANTS)

- | | | |
|---|------------|----------|
| 31. Did your marital status change during the year? Provide date. | YES | NO |
| 32. Are you living in a common-law relationship? | YES | NO |
| 33. Were any children born to you and your spouse during the year? | YES | NO |
| 34. Did any of your dependants earn income during the year?
(Ignore if we are preparing a return for those dependants) | YES | NO |
| 35. Did you support any other dependants during the year?
(If non-resident, only spouse and children may be claimed) | YES | NO |
| 36. Were you or a dependant disabled during the year?
(Impairment must have lasted or be expected to last for more than
1 year) Complete Form T2201 and provide caregiver receipts. | YES | NO |
| 37. If you began to pay child support or renegotiated your child
support payments in the tax year, please provide a copy of the agreement. | YES | NO |
| 38. Did your child (children) begin College or University in the tax year?
a) Did he or she live off residence, besides there home?
if yes, please provide a receipt that details, landlord, address and amount | YES
YES | NO
NO |
| 39. Did you receive the "Ontario Seniors Home Owners Property Tax Grant?
Please provide the statement that was sent to you. | YES | NO |
| 40. Did you sell your Principal Residence in 2018?
Please provide the Legal/Sale Closing Papers/Stmt of Account and the
original Purchase Date/Date of Acquisition | YES | NO |

OTHER

- | | | |
|---|-----|----|
| 41. Did you move? Please provide address & Telephone #. | YES | NO |
| 42. Notice of Assessment & last year's Income Tax Return. | YES | NO |
| 43. If you receive a refund, do you want Direct Deposit?
If yes, provide branch #, account # and institution # or Void cheque. | YES | NO |
| 44. Do want to authorize Canada Customs & Revenue Agency to provide Elections
Canada with your name, address and birth date to allow Elections
Canada to update the National Register of Elections. | YES | NO |
| 45. Do you own or hold Foreign property at any time in the tax year.
(with a total cost of more than CAN \$100,000) | YES | NO |

**NOTE: Any RRSP Contributions made from January 1, 2019 to March 1, 2019
must be included in your 2018 Income Tax Return**

Additional Information (Deductions or Other)
