

2019 PERSONAL INCOME TAX CHECKLIST

Name: _____

Did your personal information change?

Yes No (If Yes see reverse) ➔

INCOME

Source	Documents
<input type="checkbox"/> Employment Income	(T4 or T4A)
<input type="checkbox"/> Old Age Security	(T4OAS)
<input type="checkbox"/> Canadian Pension Plan	(T4AP)
<input type="checkbox"/> WCB/Social Assistance	(T5007)
<input type="checkbox"/> Employment Insurance	(T4E)
<input type="checkbox"/> Disposition of shares/ Capital Transactions	(Gain/Loss Report) (T5008)
<input type="checkbox"/> RRSP/RRIF Income	(T4RSP/T4RIF)
<input type="checkbox"/> Investment Income	(T5)
<input type="checkbox"/> Trust Income	(T3)
<input type="checkbox"/> US Social Security	(Form T1042-S)
<input type="checkbox"/> Rental income	(Receipts/T776)
<input type="checkbox"/> Self-Employment Income	(Receipts/T2125)
<input type="checkbox"/> Foreign Income	(Receipts/slips)
<input type="checkbox"/> Other _____	

TAX DEDUCTIONS

Source	Documents
<input type="checkbox"/> RRSP/RPP Contributions	(Receipts)
<input type="checkbox"/> Union and Professional fees	(Receipts)
<input type="checkbox"/> Child Care Expenses	(Receipts/Caregiver Name and SIN)
<input type="checkbox"/> Moving Expenses	(T1-M /Receipts)
<input type="checkbox"/> Support Payments	(Copy of Court Order)
<input type="checkbox"/> Employment Expenses	(Summary/Receipts) (T2200)
<input type="checkbox"/> Interest/Carrying Charges	(Fee Summary)
<input type="checkbox"/> Other _____	

TAX CREDITS

Source	Documents
<input type="checkbox"/> Medical Receipts	(Receipts/Summary)
<input type="checkbox"/> Donations	(Receipts)
<input type="checkbox"/> Tuition	(Form T2202)
<input type="checkbox"/> Student Loan Interest	(Receipts/Summary)
<input type="checkbox"/> Disability amount	(T2201)
<input type="checkbox"/> Volunteer firefighters	(200 eligible hours)
<input type="checkbox"/> Foreign Taxes Paid	(Receipts/Summary)
<input type="checkbox"/> Home Accessibility Exp.	(Receipts/Summary)
<input type="checkbox"/> First Time Home Buyer	(Receipts/Summary)

OTHER TAX INFORMATION

Review of important tax questions ➔

CRA correspondence

Prior Year Notice of Assessment

Your Preferred Method of Contact

Email: _____

Phone: _____

Investment Advisor Contact Information

Yes - May we contact them to obtain tax information

Name: _____ Institution: _____

Phone: _____ Email: _____

FIRST TIME FILING WITH US?

Previous 3 years Tax Return

Are you a Canadian Citizen?

Are you a Canadian Resident for tax purposes?

Do we have CRA authorization ([T1013](#))

2019 PERSONAL INFORMATION UPDATE

2019 PERSONAL INCOME TAX CHECKLIST

All current and new clients please answer the following questions:

IMPORTANT TAX QUESTIONS

- Are you a Canadian Citizen? Yes No
- Have you reviewed our 2019 Personal Income Tax Return Information Guide? Yes No
- Are you a Canadian Resident for income tax purposes? Yes No
- Do you wish to update Elections Canada with your current Address? Yes No
- Residents: Do you have foreign property in excess of \$100,000 CDN? Yes No
- Non Residents: Do you have Capital Gains/Losses (worldwide)? Yes No
- Non Residents: Do you have Capital Gains/Losses in Canada? Yes No
- Did you dispose or have a change in use of a property in 2019? Yes No
 - If yes, are you claiming a principal residence exemption? Yes No

Did your personal information change? Yes No (Same as last year)

If YES please update changes below

CONTACT INFORMATION

First Name _____	Last Name _____
SIN _____	Birthdate _____
Phone _____	Email _____
Address _____	

Marital Status Single Married Widow(er) Common Law Divorced Separated
 Date of Change _____

Spouse Name _____	
SIN _____	Birthdate _____
Income _____	Email _____

Dependant(s)

Name _____	Birthdate _____	SIN _____	Income _____
Name _____	Birthdate _____	SIN _____	Income _____
Name _____	Birthdate _____	SIN _____	Income _____