



CHECKLIST



For the Preparation of your Personal Tax Return

Item	√ if included
Marital/common law status with partner's income SIN and birth date and list of dependant children.	
T4 slips – employment income	
T4A(OAS) – old age security	
T4A(P) – Canada Pension Plan	
T4(E)- Employment insurance benefits	
T5, T3– Interest, dividends, other investment income	
T4(RSP) – Registered retirement savings plan income	
T(5007) – Workers compensation payments	
Other income slips T4A, T4RIF, T4RSP, T4PS, T5018, T5013, RC62	
RRSP receipts (deadline for contributions March 1, 2019)	
Home buyers plan withdrawals and repayments	
Union and professional dues (include slips)	
Child care expenses (T4 if issued, SIN otherwise)	
Child fitness AND activity tax credit receipts*	
Moving expenses	
T2202 – Tuition fees paid	
Rental income details:	
<input type="checkbox"/> Address of property	
<input type="checkbox"/> Gross rental income	
<input type="checkbox"/> Expenses	
<input type="checkbox"/> Details of capital additions	

Details of capital dispositions including:	
<input type="checkbox"/> Stocks, bonds (broker's statements)	
<input type="checkbox"/> Real estate	
<input type="checkbox"/> For complex portfolios, statements providing summary of capital gains, losses and book values	

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Self employment income details	
See summary schedules	
Copy of 2018 GST/HST return if registered	
Notice of assessment – 2018 (copy of 2018 personal tax return for new clients)	
Alimony or maintenance paid	
<input type="checkbox"/> Former spouse's name and address	
<input type="checkbox"/> Cancelled cheque copies	
<input type="checkbox"/> Copy of agreement	
Medical expense details (include receipts)	
T2200 – Declaration of employment (to deduct employment expenses) and details of employment related expenses	
Charitable donations (include official receipts), political donations (include official receipts)	
Public transit pass receipts or statements	
Details of investment expenses (incurred to earn investment income)	
Foreign property reporting	
Student loan interest	

Please include this checklist with your personal tax information

so that we may monitor your return preparation accordingly.

Please indicate if personal information such as home address or marital status has changed during the year.

* There are two different tax credits for children. One for fitness such as hockey and swimming and one for activities like art and music. See <http://www.cra-arc.gc.ca/tx/ndvds/tpcs/ncmtx/rtrn/cmpltng/ddctns/Ins360-390/365/menu-eng.html> for fitness and <http://www.craarc.gc.ca/tx/ndvds/tpcs/ncm-tx/rtrn/cmpltng/ddctns/Ins360-390/370/menu-eng.html> for arts.