

2018 PERSONAL INCOME TAX RETURN CHECKLIST

The following list is provided to help compile the information that we will need to prepare your 2018 personal income tax return. This list may or may not cover all areas of the Income Tax Act, but it covers the more common areas that should help as a guide. Please also bring in other information that you feel is relevant to complete your 2018 tax return.

Full Name: _____

Please fill out the personal information below if it was updated in 2018.

OR

No changes since beginning of 2018. _____ (initial)

SIN: _____

Date of Birth _____

Telephone: _____

Email: _____

Current Address: _____

Marital Status (indicate if changed and date of change): _____

Spousal Information (if not doing return): Name/SIN/Income for the year: _____

Dependent(s):

Name: _____ S.I.N. _____ Date of Birth _____

Name: _____ S.I.N. _____ Date of Birth _____

Name: _____ S.I.N. _____ Date of Birth _____

Name: _____ S.I.N. _____ Date of Birth _____

Income:

- T4 for Employment Income
- T4A for Other Income
- T4A (OAS) for Old Age Pension
- T4A (P) for Canada Pension
- T3 for Trust or Mutual Fund Income
- T5 for Investment Income
- Other income information slips that may be applicable including:
T4PS, T4E, T4RIF, T4RSP, T101, T5003, T5007, T5008, T5013, T5018, RC62

- Other Income:**
 - Self Employment Business Income & Expense details (including GST details if applicable)
 - Rental Income & Expense details
 - Farm Business Income & Expense details including applicable slips
 - Capital Gains/Losses details (dispositions of property/investments)
 - Non-Registered Investment statements (including carrying charges)
 - Alimony, Separation allowances and/or Child Maintenance (must provide separation or divorce agreement)
 - Partnership income
 - Scholarships, fellowships, bursaries
 - Gratuity income not reported on slips
 - Bitcoin or other cryptocurrency transactions

- Deductions / Credits**
 - RRSP Contribution Receipts
 - Employment Expenses (includes tools acquired by apprentice vehicle mechanics, T2200 must be completed & signed by your employer)
 - Professional or Union Dues paid Receipts
 - T2202, TL11A or T611D for Tuition for yourself / spouse or dependants (please have them sign where applicable if transferring tax credit)
 - Interest Statement for Investment Loans and Investment Counsel Fees
 - Interest Statement for Student Loans
 - Child Care expense receipts
 - Medical and Dental Expenses (including private health plan premiums paid and qualifying travel expenses)
 - Charitable Donation Receipts
 - Political Donation Receipts
 - Moving Expenses (must include receipts)
 - Alimony, Separation allowances and/or Child Maintenance (must provide separation or divorce agreement)
 - Adoption Related Expenses or Fertility Treatment Expenses
 - Disability Support Expenses (Form T2201 - qualifying for Disability Tax Credit if you or your dependants are disabled)
 - Volunteer Firefighters Certification (if over 200 hours volunteered)
 - Clergy residence deduction information including form T1223
 - Home Accessibility Tax Credit (require receipts for qualifying renovations/alterations)
 - Northern Residents Deduction
 - First Time Home Buyer (require title of property owner(s) and purchase date)

QUESTIONS / REQUIREMENTS

✓ **Elections Canada**

- Yes** I would like to provide my information to Elections Canada
- No** I would not like to provide my information to Elections Canada

- Foreign Property** (includes cash, stocks, trusts, partnerships, real estate, tangible and intangible)

property, contingent interests, convertible property, etc.)

Yes Yes Foreign property owned with a cost of more than \$100,000
(T1135 to be completed, please provide details of foreign property)

No No Foreign property owned with a cost of more than \$100,000

Notice of Assessment

Please provide a copy of your 2017 Notice of Assessment received from the Canada Revenue Agency

Direct Deposit

Do you want your tax refund deposited directly to your account in a financial institution? (NOTE: the CRA will phase out the issuance of cheques in the next couple of years)

If so, please provide your branch number (5 digits), institution number (3 digits) and your account number (9-12 digits)

U.S. Citizen/Green Card Holder/Other

Please indicate if you were a U.S. Citizen, Green Card Holder, Citizen of any other country or if your parents were born in the U.S.

Please provide any copies of your assessments from the IRS or other

Pension Income Splitting – if applicable (Form 1032 requires signature)

Yes I would like to split my pension income with my spouse if optimal

No I would not like to split my pension income (even if optimal)

Internet Business Activities (If you are self-employed)

How many internet webpages and websites does your business earn income from?

Please provide the main webpage or site address(es)

Please indicate the percentage of your gross income that is generated

NEW CREDITS / UPDATES

Principal Residence - please note, taxpayers will be required to report the disposition of a property for which the principal residence exemption is claimed

Did you sell your principal residence?

Yes

No

If Yes, please provide the following information:

a) Year of purchase: _____

b) Proceeds of sale: _____

c) Address of property: _____

Did you rent out your principal residence (fully or partially)? If so, please provide details

- Yes (100%)
- Yes (Partially)
- No

Canada Caregiver Amount

- If you provided in-home care or paid for care outside the home for a family member that was infirm. This non-refundable tax credit replaces the family caregiver credit, the credit for infirm dependents age 18 or older and the caregiver credit

✓ **Eligible Educator School Supply Credit**

- If you were a teacher or early childhood educator, provide a summary of eligible supplies to a maximum of \$1,000 in the calendar year