



2018 PERSONAL INCOME TAX CHECKLIST

PERSONAL INFORMATION:

All clients please complete the

following...

	YOU	SPOUSE
Name:		
Date of birth:		
Social insurance number:		
Marital status:		
Address:		
E-mail addresses:		
Phone numbers:	home:	work: cell:
	spouse work:	spouse cell:
Dependants	<i>Please attach separately:</i> names, social insurance numbers, birth dates and net income of all dependants.	

GENERAL INFORMATION:

- Are all individuals Canadian citizens? YES NO
- Who should we contact with questions about your tax information? _____
- Is there a date after which you will not be available to sign your return? _____
- Do you hold investments or rental properties outside Canada which originally cost in excess of \$100,000 CDN?
YES NO

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INCOME INFORMATION:

EMPLOYMENT/OTHER INCOME

- Income slips (T3, T4, T5, T4A, T4AP, T4E, T4RSP, T4RIF, T4AOAS, T4PS, T5007, T5013, RC62)
- Stock option / benefit plan statements from employer

INVESTMENT INFORMATION

- Annual investment statements for all funds held outside your registered accounts (other than RRSP, RRIF, RESP, TFSA)
- Details of all investment disposals during 2018, including information to support original purchase price (cost base)
- Details of investments that were subject to 1994 capital gains election, if any

RENTAL INCOME

- Full address, number of rental units
- Revenue and expenses, including mortgage interest, property tax, repairs, insurance, utilities, condo fees
- Percentage of personal use, if applicable
- Details of any capital improvements (eg. renovations, roof replacement, appliance purchases)
- If bought or sold in 2018, provide purchase/sale agreement, statement of adjustments, reporting letter from lawyer and allocation of value between land and building

SELF-EMPLOYMENT INCOME

- Revenue for the year (on an accrual basis)
- FIT or microFIT renewable energy contract revenue and expenses including details of purchase and installation costs.
- HST returns and instalments paid, if applicable, for the year
- Confirm method of accounting for HST (regular or quick method)



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EXPENSES:

Self-employment, Employment or Commission

- T2200 - Conditions of Employment form signed by employer
- Meals and entertainment
- Travel, promotion, conferences, dues, telecommunications, supplies, etc.
- Automotive - kilometres used for business and total kilometres per year, operating expenses, lease terms, loan interest, purchase/sale price if bought/sold in 2018
- Office-in-home - percentage used for business, rent, mortgage interest, property taxes, condo fees, utilities, insurance

DEDUCTIONS:

- RRSP receipts
- Child care, with supporting receipts and SIN of caregiver
- Union/membership dues
- Moving expenses (contact us for detailed list)
- Alimony/support payments, with copy of agreement if not previously provided
- Legal fees to collect salary, alimony, support
- Accounting fees, investment counsel fees
- Investment/business interest expense
- Tax shelter deductions - tax slips and tax reporting package
- Trades people's tools



Deadline Dates in 2019

- Jan 30: Interest payment on inter-spousal loans
- Feb 28: Filing of 2018 T4, T4A, T5 slips and summaries
- Mar 1: 2018 RRSP contributions including annual repayment of RRSP Home-Buyers (withdrawal)
- Mar 15: First personal tax instalment for 2019
- Apr 1: T3 slip and T3 trust return for calendar year end trusts

T1-OVP form to report penalty on excess RRSP contributions for 2018
- Apr 30: 2018 T1 personal income tax return (if not self-employed) and payment of any outstanding tax balance (whether self-employed or not)
- Jun 17: 2018 T1 personal income tax return, if self-employed

Second personal tax instalment for 2019

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TAX CREDITS:

- Charitable and political donation receipts
- Medical/dental/attendant care expenses with receipts
- Tuition fee receipt (T2202) , with dependent's income and signatures
- Disability credit form (T2201) for self or dependents for first-time claims
- Student loan interest statement
- Adoption costs
- Names and birth dates for children under age 18
- For seniors or disabled individuals residing on their own, or with family members, receipts for home renovations to improve accessibility (to maximum of \$10,000)
- Receipts for monthly transit passes (for seniors only)
- Indicate if eligible for first-time home buyers credit for 2018
- Indicate if infirm family member (other than child) resides with you or is dependent on you
- 2018 rent/property tax information if eligible for Ontario tax credits
- For teachers, eligible teaching supplies bought during 2018

MISCELLANEOUS:

- 2017 notice of assessment/reassessment (if not already sent to us)
- 2018 tax instalment summary
- If new personal tax client, copy of 2017 return, and carry forward details such as donations, losses, RRSP contributions, etc.
- If principal residence was sold during 2018, provide description of the property, sale proceeds and the year purchased

Tax office locations

(NO APPOINTMENT REQUIRED FOR DROP OFF)

5310 Canotek Rd. Unit #40, Ottawa, Ontario, K1J 9N5 (613-828-6955)

2650 Queensview Drive Suite #110, Ottawa, ON K2B 8H6