



# 2019 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 2019, 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 2019, 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 2019
- 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 2020

- Jan 30: Interest payment on inter-spousal loans
- Feb 29: Filing of 2019 T4, T4A, T5 slips and summaries
- Mar 2: 2019 RRSP contributions including annual repayment of RRSP Home-Buyers withdrawal)
- Mar 15: First personal tax instalment for 2020
- Mar 30: T3 slip and T3 trust return for calendar year end trusts  
  
T1-OVP form to report penalty on excess RRSP contributions for 2019
- Apr 30: 2019 T1 personal income tax return (if not self-employed) and payment of any outstanding tax balance (whether self-employed or not)
- Jun 15: 2019 T1 personal income tax return, if self-employed  
  
Second personal tax instalment for 2020

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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 buyer credit for 2019
- Indicate if infirm family member (other than child) resides with you or is dependent on you
- 2019 rent/property tax information if eligible for Ontario tax credits
- For teachers, eligible teaching supplies bought during 2019

## MISCELLANEOUS:

- 2019 notice of assessment/reassessment (if not already sent to us)
- 2019 tax instalment summary
- If new personal tax client, copy of 2018 return, and carry forward details such as donations, losses, RRSP contributions, etc.
- If principal residence was sold during 2019, provide description of the property, sale proceeds and the year purchased

\*\*\*Tax office locations\*\*\*

**(NO APPOINTMENT REQUIRED FOR DROP OFF)**

2283 St. Laurent Blvd, Suite #302, Ottawa, ON K1G 5A2 (613-828-6955)

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

1445 Stittsville Main Street, Stittsville, ON K2S 1A6