

2018 PERSONAL INCOME TAX RETURN CHECKLIST

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Personal Information
Current mailing address, phone number, and other contact information
Details of any change in marital / relationship status (i.e. common-law, married, separated, divorced)
Principal Residence
If you disposed of your principal residence during the year, please provide the following information: Description of property; Acquisition date; Disposition date; Sale proceeds; Cost; Selling expenses
Dependents
Names and birth dates of children born in 2018 and SINs of all children, if applicable
RC62 - Universal Child Care Benefits
General Income
T4 - Employment income
T4E - Employment insurance
T5007 - Workers' Compensation Benefits / Social Assistance payments
If you are a commissioned sales person – include detailed expenses related to earning income
Deductions
RRSP receipts for 2018 – first 60 days of 2019 – Any Home Buyers repayment plan
T2200 - Declaration of employment and allowable employment expenses
Union & professional dues receipts
Child care expenses and/or attendant care expenses
Spousal alimony support payments received or paid – including spouse's name and SIN
Any legal expenses to collect alimony, pension, or retiring allowances
Moving expenses if you moved 40+ km to a new job or work location
T101, T102, T5103 - Statement of exploration & development expenses
Pension Income
T4A - Pension, retirement, annuity, old age security, or other income
T4AP - Canada Pension Plan benefits
T4OAS - Old Age Security pension
T4RIF - Income from a registered retirement income fund
T4RSP - Income from registered retirement savings plans
Foreign pension income – UK or other
Investment Income & Deductions
T3 - Interest, dividends, capital gains, mutual funds
T4PS - Statement of employee profit-sharing plan allocations & payments
T5 - Investment and dividend income
T5013 - Statement of partnership income
T5008 - Statement of securities transactions
Annual trading summary; realized gain / loss on investments summary (usually obtainable from broker)
Interest paid on loans for investment purposes
Other carrying charges or investment management fees paid – for NON-REGISTERED ACCOUNTS ONLY
Information on any business investment losses
Other capital property dispositions – i.e. sale of rental property, etc.
Self-employment / Business / Professional / Rental Income & Deductions

