

2019 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)
Dependents	
	Names and birth dates of children born in 2019 and SINs of all children, if applicable
Prior Year Tax Return – Information & Correspondence	
	Copy of your 2018 Notice of Assessment and/or any Reassessments
	Copy of your last tax return if you are a new client
	Personal income tax instalments paid for 2019
Direct Deposit / CRA On-Line Mail	
	Are you registered?
	If you would like to register for direct deposit please provide a copy of a void cheque
	If you would like to register to receive correspondence from CRA on-line please let us know
Foreign Property	
	Did you own or hold foreign property with an adjusted cost base of more than \$100K at any time during 2019; i.e. Marketable securities, foreign rental property etc... Provide details
Principal Residence	
	Did you change the use of your principal residence? i.e. Move out and rent out your principal residence? Provide the following: Acquisition date; Disposition date; Cost; Sale proceeds; Selling expenses
General Income	
	T4 - Employment income
	T4E - Employment insurance
	T5007 - Workers' Compensation Benefits / Social Assistance payments
	T4A – Self-Employed Commissions
Deductions	
	RRSP receipts for 2019 – first 60 days of 2020 – 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 (Provide all receipts and records)
	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	
Details of self-employed income and expenses for the calendar year	
Home office expenses – i.e. square footage usage, utilities, insurance, strata fees, mortgage interest, property taxes & rent, if applicable	
Details of real estate rental income and expenses for the calendar year	

Other Credits	
Tuition slips (T2202A) and receipts	<ul style="list-style-type: none"> - <u>Note</u>: Education and textbook credit no longer apply – tuition only - Fees paid for Occupational Skill courses that are not at the post-secondary level may be eligible for this credit
Statement of interest paid on student loans	
Medical & dental receipts – including amounts paid to a private health services plan	<ul style="list-style-type: none"> - ONLY NON-REIMBURSED AMOUNTS
Attendant care or long-term care facility costs – may be claimed as medical expenses in certain situations	
Charitable and political donations receipts	
Home renovation expenses (up to \$10,000) that improve accessibility for qualifying individuals;	<ul style="list-style-type: none"> - A qualifying individual is: - an individual who is 65 years or older or, an individual who is eligible for the disability tax credit.
Home buyers' amount – Can claim \$5,000 for the purchase of a qualifying home:	<ul style="list-style-type: none"> - Must meet certain conditions;
Eligible Educator School Supply Tax Credit – Can claim up to \$1,000 as an eligible supplies expense. Must meet certain conditions:	<ul style="list-style-type: none"> - Eligible educator includes a teacher (elementary or secondary school) or, an early childhood educator at a regulated child care facility AND, - You held a teaching certificate, licence, permit or diploma. - Must meet the “eligible teaching supplies” conditions as set out in the CRA guide.

Additional Notes:

