



## 2019 Personal Income Tax Checklist

Please check all that apply to you and provide supporting documents

### Income

#### Tax Slips

- T4, Employment Income
- T4(A), Other Employment Benefits, Scholarships
- Other Employment Benefits
- T4A (P) - Canada Pension Plan Benefits
- T4A (OAS) - Old Age Security
- T4RSP - RRSP Income
- T4RIF - RIFF Income
- T4E - Employment Insurance Benefits
- T5007 - WCB Benefits

#### Other

- Alimony Received
- Scholarships/Bursaries
- Self Employment Income

#### Investment

- T3, T5 - Interest and Dividend Income
- T5008 - Statement of Security Transactions
- Foreign Income
- Annuities
- Rental Income and Expenses
- T5013 - Limited Partnership Income
- Details of all capital gains/losses including Broker Statements
- Sale of Real Estate

#### Business - Details of Revenue & Expenses

- Farming/Fishing Income
- Professional Earnings
- Self-Employment Commission Income

### Deductions and Credits

#### Non-Refundable Credits

- Disability Tax Credit
- T2202 Tuition Fees/Education Credit for Dependant
- Dependant's Net Income \$\_\_\_\_\_ (if we are not doing)
- Medical Receipt - Less any reimbursements from insurance

#### **Request annual summaries from your pharmacist/practitioner**

- Charitable Donations
- Canada Caregiver Amount
- Are you a first time home buyer? Yes No
- Eligible Educator School Supply Tax Credit (max \$1,000)
- Eligible Tools for Tradesperson

#### Other Expenses

- Political Contribution Receipts
- Capital Losses Carry Forward
- Allowable Business Investment Loss
- Dependant Data (GST Credit & Child Tax Benefit)
- T2200 - Declaration of Conditions of Employment
- Home Accessibility Tax Credit (max \$10,000)

#### Other Deductions

- RRSP Deductions
- Union/Professional Dues
- Alimony Paid (name, SIN, amount)
- Home Buyers Plan - RRSP
- Lifelong Learning Plan - RRSP
- Interest Paid on Student Loans
- Interest and Carrying Charges on Investments
- Investment Counsel and Accounting Fees
- Employment Expenses (Details required)
- Deductible Legal Fees
- Child Care Expenses (Including Camps, Receipts Required)
- Moving Expenses (Full Details Required)
- Did you sell your Principal residence? Yes No  
 If yes, please provide year purchased, date of sale & proceeds

Please send all supporting documents through the secure file transfer portal on our webpage: