



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 K25 1A6