

Please Complete – Both New and Existing Clients

2018 Personal Tax Return Checklist

Name	_____	Spouse's Name (if applicable)	_____
S.I.N.	_____	Spouse's S.I.N.	_____
Date of Birth (DD-MM-YYYY)	_____	Spouse's Date of Birth (DD-MM-YYYY)	_____
Marital Status	_____	Email Address	_____
Address	_____		
Phone Number	_____	Citizenship if not Canadian	_____
Dependent's Name	_____	_____	_____
Dependent's S.I.N.	_____	_____	_____
Dependent's D. of B.	_____	_____	_____

Please check only those questions that apply to you, and then assemble the information noted in the right-hand column.

Questions	YES	NO	Information Required (if YES)
Do you wish your name, address and date of birth to be provided to Elections Canada?	<input type="radio"/>	<input type="radio"/>	
Did you own a foreign property at any time in 2018 with a total cost of more than CAN\$100,000?	<input type="radio"/>	<input type="radio"/>	Please contact our office.
Have you sold a principal residence in 2018? Penalties apply is not reported!	<input type="radio"/>	<input type="radio"/>	Provide details
New to Canada/Departed Canada?	<input type="radio"/>	<input type="radio"/>	Date of Entry/Date of Departure
Previous Year's Notice of Assessment(s)	<input type="radio"/>	<input type="radio"/>	All assessments and reassessments
Are you a new client?	<input type="radio"/>	<input type="radio"/>	Previous Year's tax return
Employment Income, Employment Insurance Income?	<input type="radio"/>	<input type="radio"/>	T4s and T4As, T4E
CPP or OAS Income?	<input type="radio"/>	<input type="radio"/>	T4A (P) and T4A (OAS)
Investment Income?	<input type="radio"/>	<input type="radio"/>	T3, T5 or T5013
RRSP or RRIF Income? Homebuyer Plan withdrawals?	<input type="radio"/>	<input type="radio"/>	T4RSP and T4RIF
Did you receive or pay any spousal support?	<input type="radio"/>	<input type="radio"/>	Details of all amounts of both child and spousal support paid and received.
Did you receive WSIB or social assistance payments?	<input type="radio"/>	<input type="radio"/>	T5007
Did you receive any income, Canadian or foreign for which you did not received an information slip?	<input type="radio"/>	<input type="radio"/>	Please provide details
RRSP Contributions?	<input type="radio"/>	<input type="radio"/>	RRSP Receipts
Did you sell any unregistered securities?	<input type="radio"/>	<input type="radio"/>	Statement of Gains and Losses (usually provided by investment firm)

Did you borrow money to invest?	<input type="radio"/>	<input type="radio"/>	Statement of interest paid
Did you pay accounting or investment counsel fees?	<input type="radio"/>	<input type="radio"/>	Statement of fees paid
Did you pay fees for collecting support or wage loss?	<input type="radio"/>	<input type="radio"/>	Provide details
Did you pay professional or union dues?	<input type="radio"/>	<input type="radio"/>	Provide details/receipts
Did you pay child care expenses?	<input type="radio"/>	<input type="radio"/>	Specify name, address and SIN of recipient unless a business. Provide amounts paid.
If you are a teacher, did you incur expenses for eligible teaching supplies? Up to \$1,000 qualifies.	<input type="radio"/>	<input type="radio"/>	Provide details/receipts
Are you a volunteer firefighter or search and rescue volunteer?	<input type="radio"/>	<input type="radio"/>	
Are you or any dependent disabled?	<input type="radio"/>	<input type="radio"/>	Provide details
Did you spend \$100 or more on tuition? Did your child or spouse have unused tuition and education amounts?	<input type="radio"/>	<input type="radio"/>	T2202A and details of child or spouse amounts if we are not filing their return.
Student Loan interest?	<input type="radio"/>	<input type="radio"/>	Provide statement
Medical expenses or attendant care expenses?	<input type="radio"/>	<input type="radio"/>	Provide details and all receipts (or a report from the insurer or pharmacy)
Are you over 65 and completed renovations to make your home safer or more accessible? (Up to \$10,000 qualifies)	<input type="radio"/>	<input type="radio"/>	Provide receipts
Does a member of your family require support due to a mental or physical infirmity?	<input type="radio"/>	<input type="radio"/>	Provide details
Charitable or Political donations in 2018?	<input type="radio"/>	<input type="radio"/>	Provide receipts
Property tax or rent paid?	<input type="radio"/>	<input type="radio"/>	Provide amount paid and address(es) and landlord (if applicable) and number of months
Were any income tax instalments paid?	<input type="radio"/>	<input type="radio"/>	Provide statement
Did you move at least 40km closer to your new employer? If student, did you move to attend school?	<input type="radio"/>	<input type="radio"/>	Details of moving costs
Did you rent any property?	<input type="radio"/>	<input type="radio"/>	Details of rental income and expenses
Did you incur employment expenses?	<input type="radio"/>	<input type="radio"/>	T2200 and details of expenses
Where you self-employed as a proprietor?	<input type="radio"/>	<input type="radio"/>	Details of income and expenses? HST returns to be filed, if applicable
Are you a first-time homebuyer?	<input type="radio"/>	<input type="radio"/>	Details of purchase

Any other information: