

TAX SEASON CHECKLIST

Please provide the names, addresses, dates of birth, SIN numbers and phone numbers for everyone we will be preparing a return for on a separate page and include with your slips to us.

BACKGROUND INFORMATION ON YOU:

- Did you change your address in 2018? If so, have you notified CRA?
- Did you sell your principal residence in 2018? If so, please provide us with the details.
CRA will charge penalties if you do not report the sale on your tax return.
- Non-corporate clients only: Did you purchase Audit Shield? See note on prior year letter
- Instalments you made for 2018 taxes
- All correspondence from CRA during the year (we do not receive copies from CRA)
- Are you a citizen or have a green card of another country? (i.e. the U.S.)
- How many days were you present in the U.S. during 2018 for any reason?
- Other items (Home owners and Life Long Learning, RRSP withdrawal, moving in or out of Canada, foreign assets)

INCOME:

- T4's (employment income), T4A (Pensions and contract work), T5013 (partnership income)
- Other income (CPP, Old Age Security, disability benefits, EI benefits)
- T3's, T5's (investment slips)
- All other incomes (child support, student scholarships and bursaries, U.S. income, death benefits, WCB, RRSP, etc.)
- Lump sum income in 2018 such as: retirement allowances, pension or wrongful dismissal settlements, RRIF payout
- Foreign Income Verification Statement – Did you have foreign assets with a combined total **COST** of more than \$100,000 Canadian? This includes foreign property (real estate), investments, shares/stocks/bonds, trusts, etc. If so, did you provide us with all investment details?

SELF EMPLOYED BUSINESS INCOME & EXPENSES: (Proprietorship)

- Visit our website – see PDF in Tax Season Information page

RENTAL INCOME:

- Visit our website – see PDF in Tax Season Information page

CAPITAL GAINS & LOSSES: (and other investment income & expenses)

- Visit our website – see PDF in Tax Season Information page. Please provide, if possible, an annual gain/loss statement from your broker

DEDUCTIBLE EXPENSES: ALL OF THESE REQUIRE RECEIPTS

- RRSP contributions
- Deduction for elected pension splitting (we will review it with you)
- Annual union or professional dues
- Tradesperson tool deduction
- Are you on a qualified apprenticeship training program?
- Childcare expenses
- Disability support deduction
- Allowable Business Investment Loss (ABIL)
- Moving expenses – 40 kilometers closer to work
- Spousal support payments – we need the court agreement and proof of payment
- Tax shelter slips

EMPLOYEE AND COMMISSION SALESPERSON EXPENSES:

- T2200 tax form signed by your employer and dollar amount reimbursed by employer. Visit our website for the form
- Meals and entertainment, automobile, home office expenses and other supplies not provided by your employer

TAX CREDITS: ALL OF THESE REQUIRE RECEIPTS OR FORMS

- Names, birth dates & SIN's of ALL dependant children living with you in 2018
- Disability claims, child disability claims and family caregiver
- Volunteer Firefighter's Amount/Search and Rescue Volunteer Amount
- Teacher and Early Childhood Educator School Supply Tax Credit
- Adoption expenses
- Tuition or excess/unused tuition from dependents - includes domestic and foreign universities – **must complete and sign bottom of form for transfer**
Please include the FULL tax return for the dependant
- Bursary/Scholarship deduction – shown on form T4A, interest on student loans – a receipt issued from the bank
- Medical expenses less insurance reimbursements (**Please total these up or we charge for calculating totals**). For a list of eligible expenses go to www.cra-arc.gc.ca/medical/
- Charitable and/or political donations

PLEASE PROVIDE ALL SLIPS AND RECEIPTS

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