

STANG & COMPANY

2019 Personal Income Tax Checklist

Reporting Requirements	Form #
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|---|---|
| • Stang & Company Engagement Letter (NOTE: Must be signed annually) | <input style="width: 100%; height: 20px;" type="text"/> |
| • Stang & Company "Family Information Form" (1 per family) | <input style="width: 100%; height: 20px;" type="text"/> |
| • Did you sell your principle residence in 2019?
- Include address, year of purchase, month sold, sale price | <input style="width: 100%; height: 20px;" type="text"/> |
| • Were you a first time home buyer in 2019? | <input style="width: 100%; height: 20px;" type="text"/> |
| • Are you eligible for the disability tax credit (approval received from CRA)? | <input style="width: 100%; height: 20px;" type="text"/> |
| • Are you entitled to the northern residents deduction? | <input style="width: 100%; height: 20px;" type="text"/> |

Income Source	Form #
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Employment

- | | | |
|---|---------|---|
| • Employment income | T4, T4A | <input style="width: 100%; height: 20px;" type="text"/> |
| • Employee profit sharing | T4PS | <input style="width: 100%; height: 20px;" type="text"/> |
| • Employment expenses
- If applicable, employer will provide this form | T2200 | <input style="width: 100%; height: 20px;" type="text"/> |

Pension/Retirement

- | | | |
|--------------------------|----------|---|
| • Pension and annuities | T4A | <input style="width: 100%; height: 20px;" type="text"/> |
| • Foreign pension | | <input style="width: 100%; height: 20px;" type="text"/> |
| • Old Age Security | T4A(OAS) | <input style="width: 100%; height: 20px;" type="text"/> |
| • Canada Pension Plan | T4A(P) | <input style="width: 100%; height: 20px;" type="text"/> |
| • RRSP income/withdrawal | T4RSP | <input style="width: 100%; height: 20px;" type="text"/> |
| • RRIF income | T4RIF | <input style="width: 100%; height: 20px;" type="text"/> |

Investment

- | | | |
|--|-------|---|
| • Interest and dividends from bank accounts and securities | T5 | <input style="width: 100%; height: 20px;" type="text"/> |
| • Mutual funds and other trusts | T3 | <input style="width: 100%; height: 20px;" type="text"/> |
| • Statement of security transactions | T5008 | <input style="width: 100%; height: 20px;" type="text"/> |
| • Realized gain/loss summary on sale of securities | | <input style="width: 100%; height: 20px;" type="text"/> |
| • Capital gains and losses on sale of real property
- Statement of adjustments for sale/purchase, receipts for major renovations and improvements | | <input style="width: 100%; height: 20px;" type="text"/> |
| • Limited partnership income | T5013 | <input style="width: 100%; height: 20px;" type="text"/> |
| • Investment management and accounting expenses | | <input style="width: 100%; height: 20px;" type="text"/> |
| • Foreign income
- Details on foreign property owned at any time in 2019 (ex. Cash, stocks, trusts, partnerships, real estate (excluding personal-use only) and any other foreign property) | | <input style="width: 100%; height: 20px;" type="text"/> |
| - Foreign property summary held in a Canadian investment account (NOTE: Broker to provide this) | | <input style="width: 100%; height: 20px;" type="text"/> |

Income Source (continued...)**Form #****Other**

- Honorariums, scholarships, and bursaries T4A
- Employment Insurance T4E
- Social services benefits T5007
- RRSP Home Buyers Plan & Lifelong Learning Plan T1137
- Royalties
- Alimony; spousal support receipts
 - Include name, address, SIN of payor
- Farming
- Self-employment (business, professional, or commission)
 - Worksheet available
- Rental property
 - Worksheet available

General Deductions & Credits**Form #**

- RRSP contribution receipts
 - Including contributions made in the first 60 days of 2020
- Tuition fees T2200
 - Student must sign second page if transferring tuition credit to another taxpayer
- Interest paid on student loans
- Charitable donation receipts
- Political contribution receipts
- Medical receipts for you and your dependents
 - Please ask your pharmacist for an annual statement of prescriptions
 - Are you a caregiver for a dependent with a physical or mental function impairment?
- Unions / Professional dues
- Spousal support paid
- Child care expense receipts
- Deductible legal fees
- Interest on borrowed money used to purchase investments