



PERSONAL INCOME TAX CHECKLIST

IDENTIFICATION AND CONTACT INFORMATION (Taxpayer 1)			
Full Name	SIN	Phone	
Birthdate MM/DD/YY	Citizenship	Email	
SPOUSE INFORMATION (Taxpayer 2)			
Full Name	SIN	Phone	
Birthdate MM/DD/YY	Citizenship	Email	
DEPENDENT(S)			
Full Name	Birthdate MM/DD/YY	SIN	Citizenship
Full Name	Birthdate MM/DD/YY	SIN	Citizenship
IF ANY CHANGES			
Current Address			
Marital Status (as of Dec. 31)		Date of Change in Marital Status	

Please review the list of income and deductions/credits below, and check off those items that apply to you and your spouse.

Taxpayer 1 Taxpayer 2

Taxpayer 1 Taxpayer 2

Income

- | | | | | | |
|--------------------------|--------------------------|---|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Employment Income (T4 or T4A Slips) | <input type="checkbox"/> | <input type="checkbox"/> | Rental Income and Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | Pension Income (T4A, T4OAS, T4AP Slips) | <input type="checkbox"/> | <input type="checkbox"/> | Capital Gains (Please indicate the cost and proceeds of any asset disposals) |
| <input type="checkbox"/> | <input type="checkbox"/> | Employment Insurance Benefits (T4E Slips) | <input type="checkbox"/> | <input type="checkbox"/> | Self-Employment Income and Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | Investment Income – Interest Dividends (T5 Slips) | <input type="checkbox"/> | <input type="checkbox"/> | Retirement Income (RRSP, RRIF, Annuity) |
| <input type="checkbox"/> | <input type="checkbox"/> | Estate/Trust/Mutual Fund Income (T3 Slips) | <input type="checkbox"/> | <input type="checkbox"/> | Other Income, Support Received, Death Benefits, etc |
| <input type="checkbox"/> | <input type="checkbox"/> | Partnership Income (T5013) | <input type="checkbox"/> | <input type="checkbox"/> | |

Deductions and Credits

- | | | | | | |
|--------------------------|--------------------------|--|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | RRSP Contributions | <input type="checkbox"/> | <input type="checkbox"/> | T2201 Slips (Disability Deductions, Self or Dependents) |
| <input type="checkbox"/> | <input type="checkbox"/> | Tuition Receipts (T2202 Form) | <input type="checkbox"/> | <input type="checkbox"/> | Charitable Donations |
| <input type="checkbox"/> | <input type="checkbox"/> | Union, Professional Dues Receipts | <input type="checkbox"/> | <input type="checkbox"/> | Student Loan Interest Statement |
| <input type="checkbox"/> | <input type="checkbox"/> | Child Care Expenses (SIN, Name and Address of Caregiver) | <input type="checkbox"/> | <input type="checkbox"/> | Eligible Support Payments |
| <input type="checkbox"/> | <input type="checkbox"/> | Moving Expenses | <input type="checkbox"/> | <input type="checkbox"/> | Other Deductions (Carrying Charges, Interest) |
| <input type="checkbox"/> | <input type="checkbox"/> | Medical Expenses | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | T2200/TLI2 Forms (Employment Expenses - Include Statement of Exp.) | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | Amount of Property Tax/Rent Paid in Year (include Landlord's Name and Address of Property) | | | |

Other

- | | | | | | |
|--------------------------|--------------------------|---|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Notice of (Re)Assessment Income Tax | <input type="checkbox"/> | <input type="checkbox"/> | Do you authorize CRA to provide information about you to Elections Canada? (Check for 'Yes') |
| <input type="checkbox"/> | <input type="checkbox"/> | Installments, Final Statement Indicating Total | | | List of Foreign Property Owned if Cost > \$100,000 (T1135) |
| <input type="checkbox"/> | <input type="checkbox"/> | Details of Canada Savings Bonds Purchases/ Cashed in and on Hand | <input type="checkbox"/> | <input type="checkbox"/> | Are you a U.S. Green Card Holder? (Check for 'Yes') |
| <input type="checkbox"/> | <input type="checkbox"/> | Direct Deposit my Refund (Enclose 'Void' Cheque for Account Info) | <input type="checkbox"/> | <input type="checkbox"/> | Did you spend more than 120 days in the U.S. during 2018? (Check for 'Yes') |
| <input type="checkbox"/> | <input type="checkbox"/> | Details of any Residence Sold During the Year | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you received any private corporation dividends not exempt from TOSI? | <input type="checkbox"/> | <input type="checkbox"/> | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | |