

## PERSONAL INCOME TAX CHECKLIST - 2019 (one per person)

\*\*\*\*YOU MUST ANSWER Ques 6-11 & SIGN PAGE 2 BEFORE I CAN DO YOUR TAX RETURN\*\*\*\*

NAME: \_\_\_\_\_

BIRTHDATE (Y/M/D): \_\_\_\_\_ S.I.N: \_\_\_\_\_

HOME PHONE: \_\_\_\_\_ CELL: \_\_\_\_\_ EMAIL: \_\_\_\_\_

ADDRESS (as of Dec 31): \_\_\_\_\_ PC: \_\_\_\_\_

Did you move >40 km during the year? circle: Yes No

Old Address: \_\_\_\_\_ Date of move: \_\_\_\_\_

**NEW\*\*** Do you want to give CRA your email to receive your NOA and correspondence through CRAs my account? \_\_\_\_\_

You will no longer receive paper mail from CRA Yes No

Marital Status (circle): Single Married Common-Law Divorced Separated Widowed

Did your marital status change during the year? Circle: Yes or No If so When?: \_\_\_\_\_

SPOUSE NAME: \_\_\_\_\_ THEIR NET INCOME (if I am not preparing their return): \_\_\_\_\_

SPOUSE SIN: \_\_\_\_\_ SPOUSE BIRTHDATE (Y/M/D): \_\_\_\_\_

**FILL OUT FOR ALL CHILDREN - \*\*TAX CREDIT FOR CHILDREN <18\*\*list kids under 18\*\***

Child #1: DOB(Y/M/D): \_\_\_\_\_ SIN: \_\_\_\_\_ Mor F? Living @home: Yes/No

Child #2: DOB(Y/M/D): \_\_\_\_\_ SIN: \_\_\_\_\_ Mor F? Living @home: Yes/No

Child #3: DOB(Y/M/D): \_\_\_\_\_ SIN: \_\_\_\_\_ Mor F? Living @home: Yes/No

**PERSONAL EXEMPTIONS, DEPENDANTS AND OTHER INFORMATION**

1. Did any of your dependants earn income this year? (Ignore if we are preparing a return for those dependants) Yes No

2. Did you support any other dependants during the year? Yes No

3. Were you or a dependant disabled during the year? (Impairment must have lasted or be expected to last for more than 1 year) Complete Form 2201 and provide caregiver receipts. Yes No

4. If you started, changed or finished paying child support or alimony, please provide the agreement. Yes No

5. Did you or your child begin College/University? Yes No Did they live in residence? Yes No

**THE FOLLOWING INFORMATION MUST BE PROVIDED ALONG WITH RECEIPTS:**

*Please check the appropriate boxes, attach required documents/receipts and return to Julie's Office. #OF*

| INCOME  | DOCUMENTATION REQUIRED                   | ITEMS | N/A |
|---|--|-------|-----|
| Salaries, wages, commissions, fees, allowances  | T4, T4A                                  |       |     |
| Pensions, Disability certificate, EI Benefits   | T4A, T4AP, T4A(OAS), T4(RIF), T2201, T4E |       |     |
| Investments: Interest, Dividend, RRSP or Foreign Income   | T5, T4PS, T600, T3, T5008, T5013, T4RSP  |       |     |
| Capital Gains & Losses, Trust or Estate Income  | Buy-Sell slips, T3, T4PS, T5, Info       |       |     |
| Sale of residence? Was more than 1.24 acres sold?   | Answer yes or no:                        |       |     |
| Rental Income - Canadian or Foreign   | T776, T5013 or Income & Expenses List    |       |     |
| Alimony, child support or separation allowances, amount paid and agreement needed if new client |  |       |     |
| Other: retiring allowances, scholarships, bursaries, grants                                     | T4A, Listing of Income                   |       |     |
| Income & Expenses of Self Employment/Sole Proprietor/Farm                                       | Listing or Financial Statements          |       |     |
| WCB, social assistance, directors fees  | T5007, Receipt, Listing of income        |       |     |

Website address(es) that you earn income from & % of income from that site: \_\_\_\_\_

| DEDUCTIONS & CREDITS  | DOCUMENTATION REQUIRED  | # OF ITEMS | N/A |
|---|---|------------|-----|
| Allowable employment expenses (auto, travel etc.)   | T2200, Receipts   |            |     |
| RRSP contributions up to MARCH 1, 2020** YOU MUST SUBMIT*** these with your 2019 year or when we do 2020 taxes we will have to amend your 2019 return**** | March 1- Dec 31 2019 RRSP Slips<br><b>January 1 - March 1, 2020 RRSP Slips, Claim in 2019 or defer to 2020?</b> |            |     |
| Did you purchase a home using RRSP funds? Home buyers Plan - Did you repay?, apply for GST rebate   |   |            |     |

| DEDUCTIONS & CREDITS Continued...  | DOCUMENTATION REQUIRED                         | # OF  |     |
|--|--|-------|-----|
|  |  | ITEMS | N/A |
| Union, professional dues   | Official Receipts                              |       |     |
| Tuition fees to be deducted by Student or parent   | T2202, signed to parent?                       |       |     |
| Child Care expenses-name, address, SIN of caregiver  | Receipts                                       |       |     |
| Investment carrying charges, Loan interest for investments   | Receipts                                       |       |     |
| Safety Deposit boxes and CHILDRES FITNESS/ARTS   | NO LONGER deductible                           |       |     |
| Accounting fee receipt for prior year tax return <u>if NOT prepared by me</u> to offset investment income  |  |       |     |
| Moving Expenses(>40km) -incl. 15 day temp lodging  | T1M/Receipts                                   |       |     |
| Alimony, child support paid  | Amount   |       |     |
| Medical Expenses - for any 12 month period   | Receipts totaled <b>by person by treatment</b> |       |     |
| Ontario Property Tax Credit (provide Rent or Taxes Paid)   | Name of landlord / Municipality/Amt            |       |     |
| Student Loan Interest  | Receipts, loan statement                       |       |     |
| Are you a volunteer firefighter OR Search and Rescue?  | info re the required 200 hours                 |       |     |
| Income Taxes paid in Installments  | Receipts                                       |       |     |
| Family Caregiver Amount  | Impairment Statement from Doctor               |       |     |
| Charitable Donations   | Official Receipts                              |       |     |
| Home Accessibility Tax Credit (HATC) on Reno's - Seniors&Disabled  | Receipts up to \$10,000 **                     |       |     |
| Zero-emission vehicle purchase or lease agreement for up to \$5000 purchase incentive  |  |       |     |
| Did you organized/manage crowdfunding like GoFundMe/Kickstarter for example? tax implications (business) but not for Donation-based crowdfunding |  |       |     |
| Educator School Supply Tax Cr -Submit receipts <= \$1000, Letter from employer attesting to eligible supplies                                    |  |       |     |

In this checklist, I am requesting only those receipts, forms and statements that are required to be filed with the tax return. However, Canada Revenue Agency expects documentary support for all deductions taken and may audit all or some of those other receipts or documents after the return has been filed at an additional cost - JULIE

| YOU MUST ANSWER THE FOLLOWING & SIGN BELOW OR I CAN'T DO YOUR RETURN   | Circle |    |
|--|--------|----|
| 6.If you are a NEW CLIENT ONLY please submit to me your 2018 or last filed Income Tax Return.  | Yes    | No |
| 7.Please submit to me last years Notice of (re)assessment if you have it.  | Yes    | No |
| 8.Direct Deposit is no longer done through your personal taxes. Call CRA at 1-800-959-8281 to set up.  |        |    |
| 9.Disposition of Principal Residence - If you sold your home or other real property in 2019 or changed it from residence to rental you MUST TELL ME to ensure tax exemption, provide: proceeds, address, year acquired and number of months as Principal residence. Not reporting = max PENALTY of \$8000 with interest - this is NOT statute barred and can go back indefinitely - DID YOU SELL YOUR RESIDENCE THIS YEAR? | Yes    | No |
| 10.Are you a Canadian Citizen?   | Yes    | No |
| 11.Do you authorize Canada Revenue Agency to provide Elections Canada with your name, address and birth date so they can update the National Register of Elections.  | Yes    | No |
| 12.Did you Hold Foreign investments OR PROPERTY in tax year with total COST of >\$100,000CAD that earns income   | Yes    | No |

\*\*\*It is understood that I have provided Julie with accurate & complete information necessary to compile this tax return and she will prepare it using the information I provided. I agree that I have all receipts that support the information given to Julie and I can provide them to CRA should they request them. Julie will not audit, review or otherwise attempt to verify the accuracy or completeness of any information provided. The responsibility remains with me, the taxpayer. Julie has emphasized that this engagement cannot be relied on to prevent or detect errors or other irregularities in the information provided to her. I recognize that Julies fees are due at signoff of the tax return. I understand that my tax return will be stamped with the following: **Prepared without audit from information supplied by myself.**

I agree with your understanding of the terms of your engagement as preparer of my personal tax return as set out above. I am aware CRA can charge me a 20% penalty on unreported income from slips I may be missing if I file without them

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please return this completed and **SIGNED** checklist and submit all required information and slips to:  
**JULIE PHILLIPS CPA, CGA, 171 WATER STREET, ST. JACOBS, ON N0B 2N0**  
[mrsjuliephillips@gmail.com](mailto:mrsjuliephillips@gmail.com) or visit [www.juliephillips.ca](http://www.juliephillips.ca)