

PEVERILL & ASSOCIATES INCORPORATED CHARTERED ACCOUNTANTS

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PERSONAL INCOME TAX RETURN CHECKLIST 2019

***Unless we have the information to complete your return by April 15th, we cannot guarantee that it will be completed before April 30th. ***

THE FOLLOWING SLIPS MUST BE FILED WITH CANADA REVENUE AGENCY :

- T4 slip from each employer during 2019
- T5 slip for all interest and dividends received in 2019
- Receipt for each charitable donation made in the year
- Old Age Security received
- Print-out for each medical expense paid in the year (you can get an annual summary from your pharmacist, dentist, etc.)
- T4A for any pension received in the year
- Receipt for all RRSP contributions made in year or by March 2, 2020
- T2202A form for tuition receipts
- T3 slips for any income from mutual fund investments
- **Medical and dental premiums paid in 2019, make sure this number does not include life or disability insurance.**

RECEIPTS DO NOT HAVE TO BE SENT FOR THE FOLLOWING INFORMATION BUT SHOULD BE KEPT ON FILE :

- Child care expenses, including Social insurance number and name of caregiver.
- Receipts for interest paid in the year on student loans.
- Details on the purchase price and proceeds on any investments sold in the year.
- If you sold a house in 2019, year of purchase and the proceeds received.

THE FOLLOWING INFORMATION IS REQUIRED IF YOU ARE CLAIMING EMPLOYMENT EXPENSES :

- T2200 from your employer, including business mileage and personal mileage is claiming vehicle expenses
- Totals for each expense that you are claiming such as gas, travel, office, advertising, etc.
- Meals and entertainment amounts

OFFICE HOURS :

For the months of March and April: 8:30am – 5:30pm
For the months of May and June: 8:30am – 4:30pm

PEVERILL PORTAL :

We have a safe method for you to upload your documents rather than sending email. Check out <https://peverill.ca/join-portal> to sign up for this free service.