

## 2019 Personal Income Tax Return Checklist

PERSONAL INFORMATION							
Name		SIN (see on T4s or slips)		Home Phone Cell Phone		DOB (yyyy/mm/dd)	
Current Address						Postal Code	
Email							
Marital Status	<input type="checkbox"/> Married	<input type="checkbox"/> Single	<input type="checkbox"/> Common Law	<input type="checkbox"/> Separated	<input type="checkbox"/> Divorced	<input type="checkbox"/> Widowed	
If Marital Status changed during the year, provide date			Require to file US tax			Yes - No	
Are you Canadian resident		Yes - No		Did you sell Principal Residence last year? Yes or No (provide details if yes)		Entry into Canada (YYYY/MM/DD)	
Do you own foreign assets with aggregate cost greater than \$100,000 Canadian?				Yes - No		Complete T1135 **	
Dependents (Kids)							
Name:		DOB:		Relationship:			
Name:		DOB:		Relationship:			
				Require to pay back Home Buyers Plan or LLP? Yes - No		\$	
Income and Expense details – make sure you count all the slips to avoid any penalties and interest will be imposed by CRA. Each tax payer should use a copy of this checklist.							
Income Slips	No. of slips	Income Slips	No. of slips	Deductions/Credits		Deductions/Credits	
				D/C	No. of slips	D/C	No. of slips
T4		Support Payment		Childcare Daycare expense		First time home buyer Y/N	
T3-invest		Foreign Income		RRSP contribution		Donations	
T5-interest		Foreign investment		RRSP contribution Spousal		Caregiver	
T4A		US Social Security		Medical expense Total		Adoption expenses	
T4AP CPP		Capital gain <sup>C</sup>		Employment expenses T2200 * (see checklist)		Student Loan	
T4A-OAS		Buy & Sell real-estate		Union Dues		Tuition fee T2202 copy	
T4RSP		Rental income <sup>B</sup>		Capital loss- broker Rpt <sup>C</sup>			
T4E		Self-employed <sup>A</sup>		Disability T2201		Interest paid on investment	
T4-RIF		Commission income <sup>A</sup>		Alimony/Spousal allowance paid		Tax paid in installment	
RC62		Worldwide income		Moving Expense		Last year Notice of Assessment	
T5007				Legal Fees to recover wages		1. Other deductions	
T5018		1. Other income		Foreign Property T1135**		2.	
T5013		2.				3.	
T5008		3.				4.	