

# TULIA PINTO TPM ACCOUNTING SERVICES

## 2019 Personal Tax Checklist

To assist us in the preparation of your 2019 T1 Income Tax Return, we have prepared the following tax checklist.

Please review this list for all possible applicable items relating to your particular circumstances.

Client Name: \_\_\_\_\_

SIN: \_\_\_\_\_ Marital Status: \_\_\_\_\_ Date of Change (if applicable): \_\_\_\_\_

Dependants:

<u>Names</u>	<u>SIN</u>	<u>Birthdates</u>	<u>Net Income</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

### INCOME

#### Personal

- T4, Salaries and Employment Income
- T4A(P) - Canada Pension Plan
- T4A(OAS) - Old Age Security
- T4A - Other Income
- T4RSP – RRSP Income
- T4RIF – RRIF Income
- T4E – Employment Insurance Benefits
- T5007 – WSIB/Social Services
- T5018- (Subcontractors income)

#### Other

- Alimony Received
- Scholarships/Bursaries
- Other – Specify (no T slips received)
- Foreign pensions, other investments

#### Investment

- T3, T5, Interest, Dividends and Mutual Funds
- T5008 - Stmt. Of Security Transactions
- T600 - Canada Savings Bonds
- Foreign Income
- Annuities
- Rental Income and Expenses
- T5013 – Limited Partnership Income (Loss)
- Capital Gains/Losses (Full details required)
- T4PS – Employee-Profit-Sharing Plan

#### Self Employment

- Business Income and Expenses
- Professional Income and Expenses
- Commission Income and Expenses
- Internet Business Activities (Details)

## DEDUCTIONS AND CREDITS

### Refundable and Non-Refundable Credits

Married Amount-Spouse's Net Income \$ \_\_\_\_\_

(if spouse is doing his or her own return)

Eligible Dependant Income \$ \_\_\_\_\_

(if dependant doing his or her own return)

T2201 – Disability Deductions

T2202/TL 11 – Tuition Fees/Education Credit for Dependant- Dep. Net Income \$ \_\_\_\_\_ (if Dependant doing his or her own return)

Adoption Expenses

Interest Paid on Student Loans

Medical receipts

Child Care Expenses (Full details required)

Charitable Donations

Home buyers tax credit

Attendant Care Expenses

Educator School Supply Tax Credit

Home accessibility Tax Credit (up to \$10k) in relation to a renovation of your home to enhance mobility for seniors and DTC eligible.

### Other Deductions

RRSP Receipts (Mar 1, 2019 to Mar 2, 2020)

Employment Expenses (Full details and T2200 required)

Union, Professional Dues

Spousal Support / Alimony Paid  
 Interest on money borrowed to purchase Investments

Tools acquired by tradepersons and eligible apprentice mechanics.

TL2 – Meals and Lodging

Legal expenses to obtain a pension

Moving Expenses (Full details required)

Clergy residence deduction

Employment Insurance Benefit Repayments

### Other Credits

Political Contribution Receipts

Rent / Property Tax Paid (OTB)

### Other Information

Disposition of your principal residence or other real property

2018 NOA & 2019 Instalment Payments

Please indicate whether you authorize Canada Revenue Agency to provide your name, address, and date of birth to Elections Canada to update your information for the National Register of Electors.

Taxpayer  Yes /  No

Spouse  Yes /  No