

CARDY WINTERS & SIMON LLP

2018 PERSONAL INCOME TAX RETURN CHECKLIST



Name:	Spouse: (if applicable)
Address:	Phone:
	Email:

Did you sell your principal residence in 2018? If so, please advise us the year in which you purchased it and the amount you sold it for in 2018.

If your marital status changed in 2018, please tell us your new status and the date of that change.

Children/Dependants (if we are <i>NOT</i> completing their return <i>but</i> they are still dependants)	Income	Date of Birth

Canadian and Foreign Sources of Income (provide slips, documents or details)

	Self	Spouse		Self	Spouse
Employment (T4, T4PS)	<input type="checkbox"/>	<input type="checkbox"/>	<u>Rental Property</u> (income, expenses, purchases and sales)	<input type="checkbox"/>	<input type="checkbox"/>
Old Age Security T4A(OAS)	<input type="checkbox"/>	<input type="checkbox"/>			
Canada Pension Plan benefits T4A(P)	<input type="checkbox"/>	<input type="checkbox"/>	Capital Gains (Provide proceeds, actual cost, commission fees, dates of acquisition or disposition of stocks/bonds/mutual funds/real estate); if you are using a full service broker please ask him or her for a realized gains report for your stock trades	<input type="checkbox"/>	<input type="checkbox"/>
Pension Income (T4A)	<input type="checkbox"/>	<input type="checkbox"/>			
Employment Insurance (T4E)	<input type="checkbox"/>	<input type="checkbox"/>			
RRSP, RRIF (T4RSP, T4RIF)	<input type="checkbox"/>	<input type="checkbox"/>			
Scholarships, Bursaries (T4A)	<input type="checkbox"/>	<input type="checkbox"/>	Stock Option Benefits if they are not reported on a T4 slip	<input type="checkbox"/>	<input type="checkbox"/>
Dividends & Interest (T5/T600)	<input type="checkbox"/>	<input type="checkbox"/>			
Workers' Compensation (T5007)	<input type="checkbox"/>	<input type="checkbox"/>			
Mutual Funds/estates/trusts (T3)	<input type="checkbox"/>	<input type="checkbox"/>	Self employed commission income	<input type="checkbox"/>	<input type="checkbox"/>
Partnerships/tax shelters (T5013)	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Cardy Winters & Simon LLP

Chartered Professional Accountants

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Deductions and Credits (provide slips, documents or details)

	Self	Spouse		Self	Spouse
RRSP Contributions	<input type="checkbox"/>	<input type="checkbox"/>	Accounting/legal/investment counsel fees	<input type="checkbox"/>	<input type="checkbox"/>
Union/Professional dues not shown on a T4 slip	<input type="checkbox"/>	<input type="checkbox"/>	Interest paid on investment loans	<input type="checkbox"/>	<input type="checkbox"/>
Child Care Expenses : For individual providers include name, SIN and address. Day Camps; For overnight camps indicate number of weeks.	<input type="checkbox"/>	<input type="checkbox"/>	First-time home buyer in 2018 Qualifying home acquired during the year - date of purchase?	<input type="checkbox"/>	<input type="checkbox"/>
			Political Contributions	<input type="checkbox"/>	<input type="checkbox"/>
			Charitable donations	<input type="checkbox"/>	<input type="checkbox"/>
* Tuition fees /education amount (T2202, TL11); note that these will <i>not</i> be sent to the student automatically by the school	<input type="checkbox"/>	<input type="checkbox"/>	Disability deduction (initial claim attach T2201 signed by your doctor)	<input type="checkbox"/>	<input type="checkbox"/>
Interest paid on student loans	<input type="checkbox"/>	<input type="checkbox"/>	Teacher/ECE school supply eligible expenses	<input type="checkbox"/>	<input type="checkbox"/>
Commission/employment expenses (T2200, TL2)	<input type="checkbox"/>	<input type="checkbox"/>	Foreign Income	<input type="checkbox"/>	<input type="checkbox"/>
Alimony /maintenance paid	<input type="checkbox"/>	<input type="checkbox"/>	Adoption expenses	<input type="checkbox"/>	<input type="checkbox"/>
Moving Expenses (include distances from previous place of employment to current) – search online for “T1M”	<input type="checkbox"/>	<input type="checkbox"/>	Medical/attendant care expenses (incl. private health insurance and out of country coverage) Prescription summary printout from your pharmacy is helpful.	<input type="checkbox"/>	<input type="checkbox"/>
Deductible employment expenses	<input type="checkbox"/>	<input type="checkbox"/>	Other deductions/expenses	<input type="checkbox"/>	<input type="checkbox"/>

Other Items

	Self	Spouse		Self	Spouse
2017 Notice of Assessment/Reassessment	<input type="checkbox"/>	<input type="checkbox"/>	Property taxes/rent receipts	<input type="checkbox"/>	<input type="checkbox"/>
2018 Tax Instalments	<input type="checkbox"/>	<input type="checkbox"/>	Pension Adjustment Reversal (T10)	<input type="checkbox"/>	<input type="checkbox"/>
Distributions or loans from foreign trusts or investments	<input type="checkbox"/>	<input type="checkbox"/>	Foreign property in excess of \$100,000 (includes cash, stocks, trusts, partnerships, investment real estate, tangible and intangible property, contingent interest and convertible property)	<input type="checkbox"/>	<input type="checkbox"/>
Direct Deposit Information (If not already on file with CRA)	<input type="checkbox"/>	<input type="checkbox"/>			

Other comments or information:

*Post-Secondary Students !

Each year when we prepare the tax return for a person attending post-secondary school, we often have to ask that student to print their appropriate tax slip. The schools do *not* mail these slips to you automatically. Please log on to your school's website and print the form T2202 which will determine what you're eligible to claim on your tax return for tuition and education amounts; invoices for your tuition payments are *not* sufficient for Canada Revenue Agency. If you're attending a foreign post-secondary school, you will need to request a completed TL11A form from the school.