CPCM&Co
CHARTERED PROFESSIONAL ACCOUNTANTS

2019 PERSONAL INCOME TAX CHECKLIST **TAXPAYER NAME:** ________________________________

This checklist is meant to assist you with the assembly of your personal tax information; however, it is by no means comprehensive and includes only the most common tax items. Be sure to include any additional information not specifically mentioned that you suspect may have potential tax implications.

Feel free to contact our office if you have any questions or concerns.

Please provide us with a completed copy of this form for each taxpayer for 2019, checking all boxes that apply:

INCOME

	Type	Documents to Provide
☐	Employment/commission income	T4 or T4A
☐	Pension and other income	T4A
☐	Scholarships, grants or bursaries	T4A
☐	Old Age Security	T4A(OAS)
☐	CPP Benefits	T4A(P)
☐	Employment insurance benefits	T4E
☐	WCB/social assistance benefits	T5007
☐	RRSP income	T4RSP
☐	RRIF income	T4RIF
☐	Investment income	T5
☐	Trust income	T3
☐	Limited partnership income	T5013
☐	Security dispositions	Summary of Realized Gains/Losses, or T5008
☐	Self-employment income	Receipts or Summary
☐	Rental income	Receipts or Summary
☐	Capital gains/losses	Receipts, documents, etc.
☐	US Social Security	Form 1042-S
☐	Foreign income	Receipts, slips, details, etc.

Other income:
(e.g. tips, support payments, income not reported on Tslips, etc.)

☐ $__________________ (detail) ____________________
☐ $__________________ (detail) ____________________

OTHER TAX INFORMATION

	Type	Documents to Provide
☐	CRA correspondence	Notices, Statements, etc.
☐	Change in marital status?	Separation Agrmt, marriage date, etc.
☐	New child?	Name, DOB and SIN (if applicable)
☐	Did you sell your principal residence?	Vendor Statement of Adjustments
☐	Investment Advisor(s):	

May we contact them to obtain tax information for the year? If YES, i) please provide the following, and ii) phone your broker to give your consent so they will speak to us:

Name: ____
Institution: ____
Phone #: ____
Email: ____

☐ Other information:
(detail) ____
(detail) ____

TAX DEDUCTIONS

	Type	Documents to Provide
☐	RRSP contributions	Receipts
☐	Union and professional dues	Receipts
☐	Child care expenses	Receipts or Summary, and SIN of caregiver
☐	Moving expenses	Receipts or Summary
☐	Interest on funds borrowed for investing	Bank Statement, a description of what the funds were used for
☐	Investment counsel and/or non-reg. portfolio mgmnt fees	Receipts or Broker Statement
☐	Employment/commission exps	Receipts or Summary

Other deductions:
(e.g. support payments, ABILs, legal expenses to collect income, etc.)

☐ $_________________ (detail) ______________________
☐ $_________________ (detail) ______________________

TAX CREDITS

	Type	Documents to Provide
☐	Disability amount	T2201
☐	Tuition and education amount	T2202 or Other tax receipts
☐	Interest paid on student loans	Receipts or Summary
☐	Charitable & political donations	Receipts or Summary
☐	Medical expenses	Receipts or Summary
☐	Nursing home or attendant care	Receipts
☐	First Time Home Buyer credit	Address & Closing date
☐	Foreign taxes paid	Receipts, Correspondence, Copy of filed foreign tax return, etc.

NEW TO OUR FIRM? If so, please provide the following:

- ☐ Personal tax returns for the prior year
- ☐ Notices of Assessment and/or Reassessment for the prior year
- ☐ A void cheque to have your refund (if applicable) direct-deposited
- ☐ Statement of Account showing instalments made for the current year
- ☐ Are you a US citizen? Do you hold a Green Card?
- ☐ Did you file a T1135 last year? (Foreign investments or property with a cost of greater than $100,000)