

Personal Tax Checklist

Tax Year 2019

The information required to complete your tax return is not limited to the items listed below. This is a general guideline of some of the items that are required. If you have any questions, please contact Stark & Marsh at (306) 773-7285.

- Prior year's notice of assessment and any notice of reassessments received in the year.
- Changes in marital and or family status (please provide details – names, dates, etc.)
- Any foreign income or foreign holdings over \$100,000 (please provide details)

<u>Employment and Retirement Income</u>	
<input type="checkbox"/> T4 (s)	<input type="checkbox"/> T4AOAS (Old Age Security)
<input type="checkbox"/> T4A (s) (i.e. commission, patronage, bursaries)	<input type="checkbox"/> T4AP (Canada Pension Plan)
<input type="checkbox"/> T4PS (Profit Sharing)	<input type="checkbox"/> T4RIF (Registered Retirement Income Fund)
<input type="checkbox"/> T4RSP (withdrawal from RRSP)	<input type="checkbox"/> Foreign Pensions (details and foreign slip)
<input type="checkbox"/> Income not reported on slips (i.e. - odd jobs, tips; please give details)	
<u>Investment Income</u>	
<input type="checkbox"/> T5 (s) (investment income, dividends, etc.)	<input type="checkbox"/> T5013 (Partnership Income)
<input type="checkbox"/> T3 (s) (trust income, capital gains, dividends)	<input type="checkbox"/> T5008 (Securities Transactions)
<input type="checkbox"/> Foreign interest, dividends or capital gains	<input type="checkbox"/> Other income not reported on slips
<input type="checkbox"/> Investment statements	<input type="checkbox"/> Sale of real estate (including *principal residence)
<u>Self Employment Income (Farm, Business, Professional, or Rental)</u>	
<input type="checkbox"/> Records (ledger books, computer printouts, computer files, etc.)	<input type="checkbox"/> Capital Additions/Disposals (details of all transactions including land purchases)
<input type="checkbox"/> Ending inventory as of year end	
<u>Other Income</u>	
<input type="checkbox"/> T4E (Employment Insurance Benefits)	<input type="checkbox"/> T5007 (WCB Benefits)
<input type="checkbox"/> Taxable Alimony or Child support received	<input type="checkbox"/> Other (provide details)
<u>Employment Expenses</u>	
<input type="checkbox"/> Union and Association Dues	<input type="checkbox"/> TL2 (Transport Employees Meal Allocation and employment travel log-book)
<input type="checkbox"/> Form 2200 (Employment Expenses - signed by employer to allow expenses) travel, auto, telephone, etc. (receipts or summary required)	<input type="checkbox"/> Commission related expenses - travel, auto, sales expenses, office in home expenses, etc. (receipts or summary required)
<u>Other Deductions and Investment Expenses</u>	
<input type="checkbox"/> First-time home buyers' tax credit (details)	<input type="checkbox"/> RRSP contributions (official receipt)
<input type="checkbox"/> Donations (official receipt with charity number)	<input type="checkbox"/> Political donations (official receipt)
<input type="checkbox"/> Accounting and/or Investment counsel fees	<input type="checkbox"/> **Medical expenses
<input type="checkbox"/> Child Care expenses (receipt with name and SIN # if not a registered day care)	<input type="checkbox"/> Moving Expenses (moved to gain employment or study full-time)
<input type="checkbox"/> Interest paid on funds borrowed to invest (investments do not include RRSP's)	<input type="checkbox"/> Instalment Payments (statement from CRA, or summary of all payments)
<input type="checkbox"/> December investment statements and cost base of any shares sold during the year	
<u>Other information for tracking purposes and future reference</u>	
<input type="checkbox"/> Land purchase details	
<input type="checkbox"/> Purchase of investment properties (current or not previously discussed)	
<input type="checkbox"/> Purchase of vacation properties (current or not previously discussed)	

* Principal residence dispositions – details of original cost, any capital additions, acquisition date and proceeds of sale
 ** Medical – Only submit allowable expenses (if unsure, submit). Medical travel - keep records of all medical travel including date, location, office name, duration (CRA may request appointment confirmation so request them while in the appointment).