



## 2018 PERSONAL TAX CHECKLIST

PERSONAL INFORMATION				
First name:		Last name:		
Street address:		City:	Prov:	Postal code:
Birthdate:		SIN:		
Home phone:		Cell phone:	Work phone:	
Email 1:		Email 2:		
Marital status: Single Common Law Married Separated Divorced Widowed				
Family changes/dates (birth, marital status, death):				
Canadian citizen: Yes No		US citizen/resident: Yes No (If yes, please complete pg. 3)		
SSN/ITIN:				

COMPLETING RETURN FOR SPOUSE/PARTNER	
Completing return for spouse/partner: Yes No (provide spouse's net income – line 236 of return)	If yes, please complete personal checklist for spouse. \$
Spouse/partner first name:	Last name:
Birthdate:	SIN:

DEPENDENTS (CHILDREN OR SENIOR PARENT LIVING WITH YOU)					
Name	Address (if different)	Relationship	Birthdate	SIN	Net Income

OTHER	
Do you want to provide your address and information to Elections Canada?	Yes No
Do you own investments or real estate outside of Canada with cost exceeding \$100,000CDN?	Yes No
Were you a first time homebuyer in 2018?	Yes No
Have you sold real estate property in 2018?	Yes No
If yes, was it your principal residence?	Yes No
If newcomer to Canada, please provide date of entering the country:	
Did you leave Canada in 2018?	If so, please provide date:
If you sold your principal residence in 2018 please provide the following:	
<ul style="list-style-type: none"> <li>Date of original purchase;</li> <li>Proceeds of disposition;</li> <li>Ownership of the property</li> </ul>	

**IF THIS IS YOUR FIRST YEAR FILING WITH US,  
PLEASE PROVIDE A COPY OF YOUR PREVIOUS YEAR'S TAX RETURN**

**PLEASE CHECK THE ITEMS THAT APPLY TO YOU**

**Personal Income**

- T4, T4A – Salaries and employment
- Other employment benefits
- T4A (P) – Canada Pension Plan benefits
- T4A (OAS) – Old Age Security benefits
- T4A – Other pension or superannuation
- T4RSP – RRSP income
- T4RIF – RRIF income
- T4E – Employment Insurance benefits
- T5007 – WCB benefits/social services benefits
- T1137 – Home Buyers Plan
- T4RCA – retirement income
- Foreign Pension

**Other**

- Alimony received
- Taxable child support received
- Scholarships/bursaries
- Other – specify
- Lump-sum distributions from foreign plans

**Non-refundable Credits**

- Spousal amount – spouse’s net income
- Equivalent to married amount (full details required)
- Disability deductions
- T2202 – tuition fees
- Education credit for dependant (Dependant’s net income \$            )
- Medical receipts
- Charitable donations
- Attendant care expenses
- Limited partnership losses of other years
- Political contribution receipts
- Canada caregiver for infirm dependant (details of infirmity required)

**Other Items**

- Prior year Notice of Assessment
- Installment payments for current year
- Details of foreign property held

**Investment Income**

- T3, T5, T4S – Interest and Dividends
- T5008 – Statement of Security Transactions
- Interest on Tax Refunds received from CRA
- T600 – Canada Savings Bonds
- Foreign income (details required)
- Annuities
- Rental income (full details required)
- Summary of investment contract holdings
- T5013 – Limited partnership income (loss)
- Capital gain/losses (full details required)
- Sale of personal property with gain
- Sale of bitcoins

**Business**

- Self employment income/loss (details required)
- Farming/fishing income/loss
- Professional income/loss

**Other Deductions**

- RRSP
- Union/professional dues
- Alimony paid
- Deductible child support paid
- Interest paid on student loans
- Interest and carrying charges on investments
- Investment counsel and accounting fees
- Employment expenses (details required, form T2200)
- Deductible legal fees
- Child care expenses (receipts required)
- Moving expenses (details required)
- TL2 – Claim for boarding and lodging
- Home Buyers Plan



**COMPLETE ONLY IF YOU ARE A US CITIZEN:**

<b>PLEASE CHECK THE ITEMS THAT APPLY TO YOU</b>	
<p><b>Income from US Sources</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> W-2 Employment Income</li> <li><input type="checkbox"/> 1099 (various) Investment and Other Income</li> <li><input type="checkbox"/> 1042-S Foreign Person’s US Source Income Subject to Withholding</li> <li><input type="checkbox"/> SSA-1099 or SSA-1042-S Social Security Benefits</li> <li><input type="checkbox"/> 8288-A Disposition of US Real Estate</li> <li><input type="checkbox"/> K-1 Partner’s Shareholder Share of Income, Credit and Deductions, etc.</li> <li><input type="checkbox"/> K-1 S-Corp Shareholder Share of Income, Credit and Deductions, etc.</li> <li><input type="checkbox"/> K-1 Estate and Trust Beneficiary Share of Income, Credit and Deductions, etc.</li> </ul>	<p><b>Expenses and Deductions</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 1095-A Health Insurance Marketplace Statement</li> <li><input type="checkbox"/> 1098 Mortgage and Interest Statement</li> <li><input type="checkbox"/> 1098-T Tuition Statement</li> </ul>

<b>DISCLOSURE</b>			
Are you a US Green card holder?		Yes	No
If status was received during the year, please specify the date:			
If not a US citizen or green card holder, please specify Visa type in the US:			
Days spent in US in	2016:	2017:	2018:
If a US citizen, please provide the date of moving to Canada:			
Do you own 10% or more of the shares of a Canadian corporation or a corporation located outside of the US?		Yes	No
Do you have investments in Canadian Mutual Funds?		Yes	No
Do you have a Tax-Free Savings Account (TFSA) in Canada?		Yes	No
Do you have a Registered Education Savings Plan (RESP) for your children?		Yes	No
Did you have the amount of \$10,000USD or more at any time during the year that was held in financial institution(s) located outside of the US?		Yes	No
If you answered YES, would you like our firm to file FBAR for you?		Yes	No
Did you own \$200,000USD or more held in financial assets outside of the US at the end of the year, or \$300,000USD anytime during the year?		Yes	No
Are you a member of a Canadian Partnership?		Yes	No
Are you a trustee of a Canadian trust or an executor of the estate of a Canadian or US resident?		Yes	No
Have you received any gifts or given gifts over \$14,000 during the year?		Yes	No
If your child is a US citizen, please provide his/her SSN:			
If your child is adopted, please provide date of adoption:			