



2830 Agricola Street, Unit 1
 Halifax NS B3K 4E4
 Tel: (902) 401-5324
 Fax: (902) 418-5730
chris@chrissullivanca.com
chrissullivanca.com

2018 PERSONAL INCOME TAX CHECKLIST

- Please review this checklist as you assemble your tax slips, receipts, lists, and other information.
- Completion of this checklist in its entirety is not mandatory for returning clients. However, please bring any changes from last year and any significant matters to my attention.
- New clients are strongly encouraged to complete the entire checklist. It could save you money!

Name of taxpayer _____

PERSONAL INFORMATION

Please provide details of any changes

Telephone number: _____ E-mail: _____

Address: _____

Have you sold a principal residence this year? If so, please provide address, year of acquisition and proceeds of disposition. There are significant penalties for not reporting this information.

Your marital Status: _____ Name of spouse: _____

If spouse's return is prepared separately, their approximate net income (Line 236): _____

Dependents

Name	Relationship	Birthdate (MM/DD/YYYY)	SIN	Infirmity?	At same address?	Income

Elections Canada

- Are you a Canadian citizen? Y / N
- If yes, may CRA provide your name, address, and date of birth to Elections Canada? Y / N

Foreign Reporting

- Did you own foreign property with a cost between 100,000 CAD and 250,000 CAD any time during the year? If yes please provide total foreign income and capital gains earned during the year, the types of property, and the top three countries based on cost.
- Did you own foreign property with a cost greater than 250,000 CAD any time during the year? If yes please provide a detailed list of all foreign investments, income and gains. With any luck a special report of this may be available from your investment advisor/custodian.

EMPLOYMENT AND OTHER INCOME SOURCES

- Employment – T4
- Scholarships, grants, RESP distributions, fees for services, commissions – T4A
- Employment Insurance – T4E
- Spousal support payments received

INVESTMENT AND PENSION INCOME AND DEDUCTIONS

- Old Age Security – T4A (OAS)
- Canada Pension Plan benefits – T4A (P)
- Pension and annuity income – T4A
- RRSP withdrawals - T4RSP
- RRIF withdrawals - T4RIF
- Interest, Dividends, Investment Income – T5/T3
- Partnership Income – T5013
- Capital Gains/Losses (attach an annual realized gain/loss schedule from your investment firm)
- Did you dispose of any other capital properties this year such as real estate? If so please provide description, proceeds, original cost, and costs of disposition (legal costs, commissions, etc.)
- RRSP contribution receipts
- Interest paid to earn investment income (outside of RRSP/RRIF/TFSA/Pension accounts)
- Investment management and accounting fees (outside of RRSP/RRIF/TFSA/Pension accounts)

BUSINESS OR PROFESSIONAL INCOME AND DEDUCTIONS

- Financial statements/ schedule of revenue and expenses
- Vehicle expenses and both total and business mileage
- Business use of home: Home expenses and both total and business square footage
- List of all business asset additions and disposals (including vehicles, equipment, etc.)

RENTAL INCOME AND DEDUCTIONS

- Statement of rental income and expenses
- Annual mortgage statement/summary (to determine interest expense)
- Details of all expenditures for assets not affixed to the building or significant renovations/betterments

OTHER DEDUCTIONS AND TAX CREDITS

- Annual union, professional dues
- Child care expense receipts
For individual providers, include SIN and address: _____
For summer camps, indicate number of weeks in camp: _____
- Moving expense details - Indicate distance moved to new employment and date of move
- Spousal support paid - include name and address of recipient
- Commission and employment expenses (include details and Form T2200 from employer)
- Federal and provincial political contributions
- Charitable donations. If first time donor, please advise
- Medical expenses including private health insurance premiums, travel costs/mileage, and attendant or nursing home care (for you, your spouse and dependents)
- Are you or a dependent significantly restricted in the basic activities of daily living, blind, or requires life sustaining therapy?
- Is a person who is eligible for the disability tax credit dependent on you for some or all of the basic necessities of life (food, shelter, clothing)?
- Did you adopt a child this year?
- Are you a first-time homebuyer?
- Are you a volunteer firefighter or a search and rescue volunteer?
- Tuition fees (attach T2202/T2202A) - **The student likely has to download this form from their student portal or obtain it from the registrar's office; many institutions do not mail it **
- Did you buy shares eligible for the NS Equity Tax Credit?
- Interest paid on student loans (must be under government student loan program)
- Did you repay an unused grant or other amount?

OTHER

- Total 2018 tax installments paid: \$ _____
- Prior year assessment notices and other correspondence from the Canada Revenue Agency received during the year
- **New clients: please provide a full copy of your tax return from last year

YOUR ADDITIONAL COMMENTS OR QUESTIONS:
