

Thank you for choosing Rise CPA to manage your personal tax needs. Please complete the four sections in **BLUE**

PERSONAL		
Name: _____		
Address & Postal Code: _____		
Please provide your contact information and check off your preferred method of contact during business hours	<input type="checkbox"/> Home phone:	_____
	<input type="checkbox"/> Cell Phone:	_____
	<input type="checkbox"/> Business Phone:	_____
	<input type="checkbox"/> E-Mail	_____
SPOUSE AND DEPENDENT INFORMATION		
Change in marital status, dependents or other information? <input type="checkbox"/> No <input type="checkbox"/> Yes, Date of Change: _____		
<i>Spouse</i>		
Name:	SIN:	Birth Date:
_____	_____	_____
<i>Dependent</i>		
Name:	SIN:	Birth Date:
_____	_____	_____
<i>Dependent</i>		
Name:	SIN:	Birth Date:
_____	_____	_____

REAL PROPERTY	
You are required to report basic information on your tax return when you sell your principal residence in order to claim your principal residence exemption. Did you sell real property in 2018, including a principal residence?	
<input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, please provide the following:	
1. Address of the property sold	_____
2. Date of acquisition	_____
3. Original cost of the property	_____
4. Proceeds of disposition	_____
5. Purchaser's statement of adjustments from your original purchase	_____
6. Seller's statement of adjustments	_____

FOREIGN PROPERTY	
Are you a Canadian citizen?	<input type="checkbox"/> Yes <input type="checkbox"/> No, please specify: _____
If you are a U.S. citizen, have you been filing U.S. Returns?	<input type="checkbox"/> Yes <input type="checkbox"/> No
At any time in 2018, did you own or acquire the following specified foreign property with a total cost in excess of \$100,000 CAD?	
<input type="checkbox"/> Foreign bank accounts	<input type="checkbox"/> Interests in non-resident trusts
<input type="checkbox"/> Foreign tangible property (such as rental property)	<input type="checkbox"/> Debt owed by a non-resident
<input type="checkbox"/> Share of non-Canadian corporations	<input type="checkbox"/> Other property outside Canada
Was the total cost of all specified foreign property held:	<input type="checkbox"/> Greater than \$100,000 but less than \$250,000
	<input type="checkbox"/> Greater than \$250,000
If any of the above specified foreign property is held in an account with a Canadian registered securities dealer or a Canadian trust company, such as your bank, you can obtain the necessary information by contacting your investment advisor.	

2018 PERSONAL TAX ORGANIZER

This checklist will help you get your tax records organized

INCOME	
Personal	Investment
<input type="checkbox"/> T4 - Employment Income	<input type="checkbox"/> T3 - Trust and Mutual Fund Income
<input type="checkbox"/> T4E - Employment Insurance Benefits	<input type="checkbox"/> T5 - Interest and Dividends
<input type="checkbox"/> T4PS - Employee Profit-Sharing Plan Allocations and Income	<input type="checkbox"/> T600 - Canada Savings Bonds
<input type="checkbox"/> T4A - Pension, Retirement, Annuities and Other Income	<input type="checkbox"/> T5008 - Statement of Security Transactions
<input type="checkbox"/> T4A(OAS) - Old Age Security Benefits	<input type="checkbox"/> T5013 - Limited Partnership Income (Loss)
<input type="checkbox"/> T4A(P) - Canada Pension Plan Benefits	<input type="checkbox"/> Capital Gains/Losses (Summary Schedule)
<input type="checkbox"/> T5007 - WCB Benefits/Social Services Benefits	<input type="checkbox"/> Rental Income (Summary Schedule)
<input type="checkbox"/> T4RIF - RRIF Income	
<input type="checkbox"/> T4RSP - RRSP Withdrawal	

INCOME CONT'D	
Business	Other
<input type="checkbox"/> Self-Employed Earnings Information	<input type="checkbox"/> Alimony Received
<input type="checkbox"/> Self-Employed Commissions Earnings Information	<input type="checkbox"/> Taxable Child Support Received
<input type="checkbox"/> Professional Earnings Information	<input type="checkbox"/> Scholarships/Bursaries
<input type="checkbox"/> Farming/Fishing Earnings Information	<input type="checkbox"/> Other-Specify

DEDUCTIONS AND CREDITS	
Personal	Investment
<input type="checkbox"/> Adoption Expenses	<input type="checkbox"/> Interest and Carrying Charges on Investments
<input type="checkbox"/> Alimony Paid	<input type="checkbox"/> Interest Paid on Student Loans
<input type="checkbox"/> Allowable Business Investment Loss	<input type="checkbox"/> Investment Counsel and Accounting Fees
<input type="checkbox"/> Apprentice Job Creation Credit	<input type="checkbox"/> Medical/Dental/Vision Receipts
<input type="checkbox"/> Attendant Care Expenses	<input type="checkbox"/> Moving Expenses
<input type="checkbox"/> Caregiver Amount	<input type="checkbox"/> Political Contribution Receipts
<input type="checkbox"/> Charitable Donations (Official Tax Receipts)	<input type="checkbox"/> Premiums Paid to Private Medical Insurance Plans
<input type="checkbox"/> Child Care Expenses	<input type="checkbox"/> Prescription Receipts Summary from Your Pharmacy
<input type="checkbox"/> Children's Arts Receipts	<input type="checkbox"/> RRSP Receipts
<input type="checkbox"/> Children's Fitness Receipts	<input type="checkbox"/> Social Benefit Repayments
<input type="checkbox"/> Deductible Child Support Paid	<input type="checkbox"/> Spouse Amount - Equivalent to Spouse's Net Income
<input type="checkbox"/> Deductible Legal Fees	<input type="checkbox"/> Spouse Amount - Spouse's Net Income
<input type="checkbox"/> Disability Support Deductions	<input type="checkbox"/> Tradespersons Tools Expenses
<input type="checkbox"/> Disability Tax Credit Certificate	<input type="checkbox"/> Tuition - T2202/T2202A - Tuition Fees
<input type="checkbox"/> Employment Expenses - Expense Summary	<input type="checkbox"/> Tuition - Dependent's Net Income (For Transfer of Credits)
<input type="checkbox"/> T2200 Declaration of Conditions of Employment	<input type="checkbox"/> Union and Professional Dues
<input type="checkbox"/> Homebuyers Credit	

CRA CORRESPONDENCE

2017 Notice of Assessment (CRA)

Summary of 2018 Tax Instalment Payments

OTHER INFORMATION

Please indicate whether you are willing to authorize Canada Revenue Agency to provide your name, address, and date of birth to Elections Canada to update your information for the National Register of Electors.

Yes

No

Please use this space for any additional information or notes: