



2019 Personal Tax Checklist

Thank you for choosing Rise CPA to manage your personal tax needs. For accuracy in preparing your returns, please complete the four sections in **GREEN**

PERSONAL

Name: _____

Address & Postal Code: _____

Contact Number: _____ Marital Status: _____

E-Mail: _____

Single
 Married
 Common-law
 Divorced
 Separated
 Widowed

DEPENDENTS INFORMATION

Name	Relationship	DOB	Physically or mentally infirmed	Income	Child Care Expenses

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 2019, including a principal residence?

Yes 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? Yes No, please specify: _____

If you are a U.S. citizen, have you been filing U.S. Returns? Yes No

At any time in 2019, 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.

2019 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"/> Alimony Received
<input type="checkbox"/> T4RSP - RRSP Withdrawal	<input type="checkbox"/> Taxable Child Support Received
<input type="checkbox"/> Self-Employed Earnings Information	<input type="checkbox"/> Scholarships/Bursaries
<input type="checkbox"/> Self-Employed Commissions Earnings Information	<input type="checkbox"/> Other-Specify
<input type="checkbox"/> Professional Earnings Information	
<input type="checkbox"/> Farming/Fishing Earnings Information	

DEDUCTIONS AND CREDITS	
Personal	
<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"/> Deductible Child Support Paid	<input type="checkbox"/> RRSP Receipts
<input type="checkbox"/> Deductible Legal Fees	<input type="checkbox"/> Social Benefit Repayments
<input type="checkbox"/> Disability Support Deductions	<input type="checkbox"/> Spouse Amount - Equivalent to Spouse's Net Income
<input type="checkbox"/> Disability Tax Credit Certificate	<input type="checkbox"/> Spouse Amount - Spouse's Net Income
<input type="checkbox"/> Employment Expenses - Expense Summary	<input type="checkbox"/> Tradespersons Tools Expenses
<input type="checkbox"/> Eligible Teaching Supplies Purchased (for teachers and early educators only)	<input type="checkbox"/> Tuition - T2202/T2202A - Tuition Fees
<input type="checkbox"/> T2200 Declaration of Conditions of Employment	<input type="checkbox"/> Tuition - Dependent's Net Income (For Transfer of Credits)
<input type="checkbox"/> Homebuyers Credit	<input type="checkbox"/> Union and Professional Dues

CRA CORRESPONDENCE

2018 Notice of Assessment (CRA)

Summary of 2019 Tax Instalment Payments

OTHER INFORMATION

Please use this space for any additional information or notes: