

2018 Personal Tax Return Checklist

Name(s) _____
 Address _____
 Email Address _____ Phone# _____ Cell# _____

Please answer all questions and provide details: Yes No Details

Did your marital status change in 2018
 (including common law)? _____

(Please provide a copy of separation agreement)
 Do you have any new dependants? _____

Are you a Canadian Citizen? _____

If you are a Canadian Citizen, do you
 want your name, address, and date of birth
 provided to Elections Canada? _____

Did you own any foreign property at any time in
 2018 (eg. foreign investments, real estate, etc.)? _____

Income:

Have you provided us with all of your T4,
 T5 and/or T3 slips which you expect to receive? _____

Did you sell any stocks or bonds? _____

Did you sell any real estate (other than your home)? _____

Did you buy a new home? _____

Did you sell your home (principal residence)? _____

Please provide: address, year of acquisition,
 cost at acquisition, proceeds of disposition) _____

Did you have any other sources of income in 2018? _____

Deductions:

Did you make an RRSP contribution for 2018? _____

Are you an apprentice? _____

Did you pay any tax installments? _____

Have you provided us with information regarding:

Interest **paid** on loans used for investing _____

Investment management fees _____

Union dues _____

Tuition fees (yourself or dependant) _____

(Please have student sign before bringing in)

Moving expenses _____

Employment expenses _____

Alimony _____

Childcare _____

Donations/political contributions _____

Medical expenses (including travel) _____

RRSP (including Home Buyers repayment) _____

Trades person's tool expenses _____

Volunteer firefighter's amount _____

PLEASE USE THE BACK OF THIS FORM TO PROVIDE ADDITIONAL INFORMATION

