Blossom CPA

2019 Personal Income Tax Checklist

Please review this checklist and where applicable, provide the necessary slips or information via Email to connect@blossomcpa.ca.

Please include this checklist with your package with the applicable items that you have enclosed checked off.

Refer to the following date for common tax forms:

February 28, 2019: T4, T4A, T5, T4RSP, T4RIF, T101

March 31, 2019: T3, T5013

Questions:

1. Are you a Canadian citizen? Yes ◯ No ◯

2. Would you like to receive your final 2019 tax return in electronic format? Yes ◯ No ◯

3. If yes to the above, please provide the email address to send your tax returnto:

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4. Do you want to receive notifications from CRA by email? No personal/confidential information will be transmitted by email. The email notification will be a generic message, you need to log in to your personal CRA My Business account to view correspondence – including notices of assessment – CRA website Yes ◯ No ◯

5. At any time in 2019, did you own non-Canadian property (real estate that you rented to others, investment accounts, shares in non-Canadian companies, etc.) with a total cost amount of more than C$100,000? Yes ◯ No ◯

6. (a) Are you a US person (US citizen or GreenCard holder)? Yes ◯ No ◯

(b) For purposes of citizenship mentioned above, do/did you have a US passport, or are/were you a US citizen or US Green Card holder? Yes ◯ No ◯

(c) Did you earn employment income from the USin 2019? Yes ◯ No ◯

7. If you are not a US person, did you spend more than 122 days in the US in any of the past 3years?

Yes ◯ No ◯

If yes, please estimate the number of days (2017______, 2018______, 2019______)

8. If your marital status changed during the year, please indicate the date of change:

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9. Please ensure we have the full names and dates of birth for all children or dependants, and SIN numbers:

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10. If you have a spouse or common-law partner and we are NOT preparing his/her return, please provide the following: Spouse's Name: ____
Spouse's SIN:____Net income from line 236 of spouse's income tax return: ____

NEW CLIENTS: (please complete the following if you are a new client)

Taxpayer Name: ____

Taxpayer Birth Date: ______________________________

Taxpayer Marital Status: Married ◯ Common-Law ◯ Separated ◯ Divorced ◯ Widowed ◯ Other (Specify) ____________________

If applicable:

Spouse's Name:________________________________Spouse's Birth Date :___________________

EMPLOYMENT INCOME

	Commission income	T4A
	Employment income and benefits	T4 and details of benefits
	Bonus or other supplementary pay	T4
	Payments from DPSP or profit sharing plan	TRA/T4PS
	Severance pay or retirement allowance	T4A
	Tips, casual wages or part-time salary	T4, T4A or pay slip or summary showing amount received

RETIREMENT INCOME

	Old Age Security	T4A(OAS)
	Canada Pension Plan	T4A(P)
	Disability benefits	T4A(P)
	Other pension or superannuation	T4A
	Foreign pension income	Foreign jurisdiction reporting slip / withholding tax details
	RRSP annuity income	T4RSP
	RRIF annuity income	T4RIF
	Other annuity income	T4A

OTHER INCOME

	Employment insurance benefits	T4E
	Dividend income	T5
	Interest income	T5
	Foreign income	Foreign jurisdiction reporting slip/ withholding tax details
	Partnership income: limited or non-active partners	T5013
	Rental income/loss	Statement of Rental Income and Expenses or Form T776
	Capital gains/losses	Purchase/disposition details (T5/T3 slips, broker statements)
	Principal residence disposition	Details including year of acquisition, proceeds of disposition, property address
	Alimony/support payments	Amount received
	Income from a trust/mutual fund	T3 Details of income and cost base adjustments
	Canada Savings Bond /other bond interest	T600 / other
	Annuity income	T4A
	Patronage allocation – Co-op/UFA	T4A
	Farm support payments	AGR-1
	Other income / royalty income	T5
	Worker's Comp/Social Assistance (non-taxable)	T5007
	Universal Child Care Benefit	Form, or amount
	Quebec – other relevé (RL) slips	RL slips

SELF-EMPLOYMENT INCOME

	Business income	Details of all income and expenses or Form T2125
	Professional income	Details of all income and expenses or Form T2125
	Partnership income	Statement of partnership income and allocation or T5013
	Commission (self-employed)	Details of all income and expenses
	Farming	Details of all income and expenses or NISA Form
	Joint venture	Joint venture statements

DEDUCTIONS

	RRSP	Official contribution receipts *
	RRSP rollovers or withdrawals	Details – also inform us of Home Buyer Plan information
	Annual union, professional or like dues	T4 or receipts
	Child care expenses	Details of payment / SINs where applicable
	Business investment loss	Details of disposition and/or uncollectibility
	Moving expenses	Details / T1M
	Alimony / support payments	Name & address of payee; if first year, copy of agreement
	Carrying charges and investment expenses	Details
	Tax shelter write-offs, flow-throughs	T5013, T101
	Employment-related expenses	Details
	Other deductions	Details

* Ensure that details of RRSP contributions in kind (i.e., non-cash contributions) are provided.

TAX CREDITS

	Spousal credit	Details of net income for spouse
	Equivalent-to-spouse credit	Details including net income for spouse equivalent
	Dependent credit	Details including net income for each dependent
	Disability credit	Details, if 1st year, T2201
	Tuition and education credit	T2202A, T2202
	Interest paid on student loans	Details
	Medical credit	Official medical receipts
	Donation credit	Official donation receipts
	Political credit (Federal or Provincial)	Official political donation receipts
	Share purchase credit / investment tax credit	Details of eligible property / T2038
	Labor sponsored funds credit	T5006
	Public transit passes	Transit pass, proof of payment
	Home buyer's tax credit	Details if acquired qualifying home after 27 Jan 2009 (i.e. closing date)
	Children's fitness tax credit / arts credit	Details and receipts

OTHER

	Instalments	Instalment payments summary (final for current year)
	Notice of (Re)Assessment issued in the year	Notice of Assessment / Notice of Reassessment
	GST / HST form	Please send to us if you would like us to prepare return

Comments / list of items to be sent at a later date:

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