clearline CPA

Clarity. Strategy. Confidence.

Personal Tax Checklist for 2019

THE BASICS – INFORMATION USED TO IDENTIFY YOUR TAX FILINGS

☐ **Our address information is unchanged from our filing last year**

Name and Address (If changed)

Last Name	First Name
Date of Birth	SIN
Home Phone	Mobile
Email Address	
Spouse Last Name	Spouse First Name
Date of Birth	SIN
Home Phone	Mobile
Email Address	
Address Line 1	
Address Line 2	

City	Province	Postal Code

Marital and Other Canadian Obligations

On December 31, 2019 your marital status was:

☐ Single ☐ Common-law ☐ Married ☐ Divorced ☐ Separated ☐ Widowed

Did your marital status change in 2019? ☐ Yes ☐ No **If yes, what was the date of change:**

Please circle the correct answer for each of the following questions, which are required in preparing your tax return:

	You	Spouse
• I have read, signed and returned a copy of the 2019 personal tax engagement letter *(We cannot release your return to the government without this form in our possession)*	☐ Yes ☐ No	☐ Yes ☐ No
• I am eligible for the disability amount and have a T2201 on file	☐ Yes ☐ No	☐ Yes ☐ No
• I disposed of a principal residence during the year (See page 4)	☐ Yes ☐ No	☐ Yes ☐ No
• I authorize the registration for the CRA online notification, rather than mail	☐ Yes ☐ No	☐ Yes ☐ No
• I am a Canadian citizen	☐ Yes ☐ No	☐ Yes ☐ No
• I authorize the CRA to release my name, address and date of birth to Elections Canada for the purpose of updating the National Register of Electors	☐ Yes ☐ No	☐ Yes ☐ No
• I am a Canadian resident on December 31, 2019	☐ Yes ☐ No	☐ Yes ☐ No
• I am a US Citizen or a green card holder	☐ Yes ☐ No	☐ Yes ☐ No
• I have owned foreign property during 2019 with a total cost of more than Canadian $100,000. *(Refer to the engagement letter for more information and complete Appendix F if applicable)*	☐ Yes ☐ No	☐ Yes ☐ No

THE BASICS – INFORMATION USED TO IDENTIFY YOUR TAX FILINGS

Children or dependents	
Last Name	First Name
Date of Birth	SIN
Email Address	Relationship
Address, if different from above	
Last Name	First Name
Date of Birth	SIN
Email Address	Relationship
Address, if different from above	
Last Name	First Name
Date of Birth	SIN
Email Address	Relationship
Address, if different from above	
Last Name	First Name
Date of Birth	SIN
Email Address	Relationship
Address, if different from above	

In this section we want to learn about the slips that will be used to prepare typical data for your tax return. These first questions are asking what type of slip we should expect in the package you are delivering.

TAXATION SLIPS – ITEMS TO INCLUDE IN YOUR PACKAGE

T4 Slips		Do you have these?	
		You	Spouse
T4	Salary, wages and benefits	☐	☐
T4A	Pension, retirement and other income	☐	☐
T4A (P)	Canada Pension Plan benefits	☐	☐
T4A (OAS)	Old Age Security	☐	☐
T4E	Employment insurance and other benefits	☐	☐
T4RIF	Income from registered retirement income funds	☐	☐
T4RSP	Income from registered retirement savings plans	☐	☐
T5 Slips		**Do you have these?**	
		You	Spouse
T5	Statements of Investment income	☐	☐
T5007	Statements of benefits	☐	☐
T5008	Securities transactions	☐	☐
T5013	Partnership income	☐	☐
T3 Slips		**Do you have these?**	
		You	Spouse
T3	Trust income and distributions	☐	☐
Miscellaneous Government Slips		**Do you have these?**	
		You	Spouse
RC210	Working Income Tax Benefit	☐	☐
T101	Statement of resource benefit	☐	☐
T2202A	Tuition and textbook amounts certificate	☐	☐
Other	Did we forget something?	☐	☐

INCOME WITH NO SLIPS – PLEASE INCLUDE SUPPORTING DOCUMENTS

Other Income	Amount	
	You	Spouse
Gratuities and tips	$	$
Casual earnings	$	$
Spousal support	$	$
Other: Did we forget something?	$	$

CAPITAL TRANSACTIONS ON PROPERTY, INVESTMENTS AND REAL ESTATE

	You	Spouse
Did you sell any real estate property (or properties) in 2019 for which you are claiming a principal residence exemption?	☐ Yes ☐ No	☐ Yes ☐ No
Did you have any realized capital gains or losses, other than a principal residence, during 2019?	☐ Yes ☐ No	☐ Yes ☐ No

(If yes to either of the above, we require the following information)

Type of Investment	Please provide the following:
Investments held in a brokerage account (non-registered accounts)	• Realized capital gain/loss report • Summary statement of all stock-transactions, including the Average Cost Base (ACB) for each stock sold
Investments not held in a brokerage account (nonregistered accounts)	• Summary of all sales, including the original purchase price and the proceeds on sale
Real estate	• Purchase and sale agreements, statement of adjustments, and other pertinent information
Other investments	• Purchase and sale agreements, statement of adjustments, and other pertinent information

Investment Advisor	
First Name	Last Name
Institution or Firm Name	
Phone Number	
Email	
Does Clearline have permission to email your advisor for any missing investment statements needed for your 2019 tax return?	☐ Yes ☐ No

DEDUCTIONS FROM INCOME – See Appendices

I (We) have Rental Properties and have completed Appendix A	☐ Yes	☐ No
I am (We are) Self-Employed and have completed Appendix B	☐ Yes	☐ No
I am (We are) claiming Home Office Expense and have completed Appendix C	☐ Yes	☐ No
I am (We are) claiming Automobile Expenses and have completed Appendix D	☐ Yes	☐ No
I am (We are) claiming Employment Expenses and have completed Appendix E	☐ Yes	☐ No
I (We) have Foreign Investments and have completed Appendix F	☐ Yes	☐ No

ADDITIONAL INFORMATION

Description – Attach Receipts and Details	Amount	
	You	Spouse
Instalment payments made to Canada Revenue Agency	$	$
RRSP contributions or lump sum transfers	$	$
Medical receipts	$	$
Donation receipts and political contributions	$	$
Child care expenses	$	$
Adoption expenses	$	$
Canadian caregiver credits	$	$
First-time home buyer (please include purchase price and date)	$	$
Union, professional, or like dues	$	$
Interest on student loans	$	$
Moving expenses, if at least 40 kilometres closer to work or school	$	$
Interest paid on loans for investment purposes	$	$
Investment management fees paid	$	$
Other investment related expenses	$	$
BC teacher supplies expenses	$	$
Senior home renovation credit	$	$
Tradesperson tools deduction	$	$
Volunteer firefighters amount	$	$
BC training tax credit	$	$
Northern residents deduction	$	$
Other – Did we forget something?	$	$