



Chartered Professional Accountants

2018 Personal Income Tax Checklist

Income

- All Tax information slips—T3, T4, T4A, T5, T5013. Please ensure you check for slips on-line (investment and tuition).
- [Self Employment information](#) (business revenue and expenses).
- [Rental Property information](#) (rental revenue and property expenses).
- [Alimony/Child Support](#) (received) including a copy of legal agreement.
- [Capital Gains/Loss](#)—we will require proceeds from sale and the adjusted cost base.
- [Other income not reported on T-slips](#) (foreign income, foreign pension income, tips, etc).

Deductions and Tax Credits

- [RRSP Contribution Receipts](#) (contributions up to March 1, 2019).
- [Union or professional dues](#).
- [Interest](#) on money borrowed to purchase investments and investment management fees.
- [Interest paid on student loans](#).
- [Employment expenses](#) or [tradesperson tool expenses](#) including [T2200](#) signed by employer.
- [Alimony/Child support paid](#) including a copy of legal agreement and proof of payment.
- [Adoption expenses](#).
- [Tuition fees](#) T2202A slips (for yourself or a dependent such as child or grandchild).
- [Child Care Expenses](#) (this includes any expenses specifically incurred to allow parents to work).
- [Moving expenses](#) (if you have relocated for work purposes).
- [Legal expenses](#) (to establish a right to employment income, pension income, child/spousal amounts to respond to CRA).
- [Charitable donations](#) and [political contributions](#).
- [First Time Home Buyer tax credit](#).
- [Medical expenses](#) (including dental work, prescription eyewear, attendant care expenses, travel medical insurance, [travel expenses](#) including travel log and doctors note for requirement to travel).
- [Disability tax credit](#)—Please advise us of any disabilities you or your spouse or dependents might have.
- Please let us know if you are a caregiver for a financially dependent relative.**
- [BC Seniors Home Renovation tax credit](#) and [Federal Home Accessibility tax credit](#) (claim up to \$10,000 of costs that provide seniors 65 and older and or disabled with increased independence and flexibility to remain in their homes).
- [Volunteer firefighter](#) and/or [Search and Rescue Volunteer](#) who provided more than 200 hours of eligible volunteer services in 2018.
- [Teacher and Early Childhood Educator School Supplies](#) (claim up to \$1,000 in supply expenditures if you are a teacher or childhood educator.)



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Other Items

- [Tax Instalments](#) paid for 2018.
- Any changes to personal profile: Marital Status, dependents, address and phone number. Please ensure we have records for all dependents.
- [Province of residence](#) on December 31, 2018.
- [Home Buyer Plan](#) and or [Life Learning Plan](#) repayment schedule.
- Details of [foreign property](#) owned in 2018.
- GST return that needs to be filed.
- Certified Copies of Power of Attorney Agreements if you are representing someone or being represented by someone.
- Signed and completed Engagement Letter (see enclosed).
- [Direct Deposit](#) information (Bank account transit, bank, and account information—void cheque or PAD form).
- [Sale or change in use of your Principal Residence](#)—even if the gain is fully exempt from income tax, we will need details on the purchase and sale of the property.

Notices

- If you are going to be away on vacation during tax season please inform us and bring in your records as early as possible.
- Caution: Missing Income slips**—We strongly recommend that you ensure you have all of your income slips. Failure to report all income from your slips could result in substantial penalties and interest.
Always bring in late slips as soon as possible.

Important Dates

- ◆ **March 1, 2019**—Last day to contribute to RRSP in order to deduct it on your 2018 tax return.
- ◆ **April 30, 2019**—Tax balance due for all 2018 tax returns and filing due date for most taxpayers.
- ◆ **June 17, 2019**—Tax return filing due date for self-employed taxpayers.

It's not what you earn, it's what you keep!

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