



Chartered Professional Accountants

2019 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 2, 2020).
- [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 2019.
- [Eligible educator school supply tax credit](#) (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 2019.
- 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, 2019.
- [Home Buyer Plan](#) and or [Life Learning Plan](#) repayment schedule.
- Details of [foreign property](#) owned in 2019.
- 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

- ◆ **February 29, 2020**—Last day to contribute to RRSP in order to deduct it on your 2019 tax return.
- ◆ **April 30, 2020**—Tax balance due for all 2019 tax returns and filing due date for most taxpayers.
- ◆ **June 15, 2020**—Tax return filing due date for self-employed taxpayers.

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

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