

Please advise us of any significant life events which occurred last year, such as:

- change in marital status ● purchase of a home ● birth of a child ● other new dependents ● medical intervention to conceive a child ● adoption expenses ● death or impairment of a relative (caregiver)

Please provide all of the following, where applicable:

- **Information slips** such as T3, T4, T4A, T4A(OAS), T4A(P), T4E, T4PS, T4RIF, T4RSP, T5, T10, T2200, T2202, T101, T1163, T1164, TL11A, TL11B, TL11C, T5003, T5007, T5008, T5013, T5018
- **Receipts** such as RRSP contributions, instalment payments, property taxes, rent paid, childcare expenses, charitable donations, medical expenses, interest paid on student loads, eligible educator school supplies, union or professional dues

Use this checklist to assist in gathering all the necessary information to complete your tax return

EMPLOYMENT EXPENSES

- Vehicle & Office (Form T2200 completed)
- Sales Expenses (Summarized)
- Relocation Expenses
- Meals & Lodging (Form TL2 Completed)

SELF-EMPLOYMENT/COMMISSION INCOME

- Income & Expenses (Summarized)
- Registered for HST (BN number, filing)
- Home Office, Vehicle (Travel Log Book)
- Internet Business Activities - Details
- Purchase/Sale Assets - Details

OTHER DEDUCTIONS

- Disability Tax Credit
- Home Accessibility Tax Credit
- Legal Fees to Collect Income/Support

OTHER IMPORTANT TAX MATTERS

- Do you own foreign property with a cost amount over \$100,000? If so, provide property information including address, income earned from the property and purchase or sale information
- Do you have Canadian Citizenship Yes or No
 - If Yes, do you authorize Canada Revenue Agency to give your name, address, date of birth and citizenship to update National Register of Electors; or if 14 to 17, update Register for Future Electors
- Details of the sale of your personal residence must be reported on your tax return. If you sold your home in 2019 please provide the year of purchase and the amount sold for

RENTAL INCOME AND EXPENSES

- Purchase/Sale Property - Details
- Income & Expenses (Summarized)
- Personal & Rental Use (Percentage of Use)
- Repairs, Maintenance, Improvements - Details

INVESTMENT INCOME AND EXPENSES

- Investment Trading Summary
- Interest Paid Related to Investment Income
- Investment Management Fees
- Accounting Fees to Record Income
- Purchase/Sale of Other Property - Details

OTHER INCOME

- Tips & Gratuities
- Spousal Support Received/Paid (Court Order)
- Foreign Income (e.g. Pensions, Investments)