SAEED & COMPANY
CHARTERED ACCOUNTANT
PROFESSIONAL CORPORATION
346 FORMAN AVENUE
TORONTO, ONTARIO, M4S 2S7

2019 Personal Tax Information Checklist

IDENTIFICATION:

A. Personal Information

1. Name: ______________________________

2. Residence address: ______________________________

   ______________________ Postal Code: ______________________

3. Email address: ______________________________

4. **Telephone - Bus:** ______________ Cell: ______________

   - Res: ______________________________

5. Social Insurance Number: ______________________________

6. Date of birth: ______________________________

7. If employed - type of work or position: ______________________________

   - name of present employer: ______________________________

8. 2018 Notice of Assessment and any 2018 reassessments (please attach a copy to the package)

9. Were you born in the U.S. or are you a U.S. citizen? YES NO

B. Spousal Information

10. Date of change in marital status, if applicable: ______________________________

11. Full name of spouse: ______________________________

12. Social Insurance Number: ______________________________

13. Date of birth: ______________________________

14. Copy of your spouse's return
    (in the event we do not prepare it): ______________________________

15. Was your spouse born in the U.S. or is he/she a U.S. citizen? ☐ YES ☐ NO

C. Dependant Information

	Dependant 1	Dependant 2	Dependant 3
16. Name of dependants:	______	______	______
17. Relationship to self:	______	______	______
18. Date(s) of birth:	______	______	______
19. Net income details:	______	______	______
20. Social Insurance Number (if available):	______	______	______
21. Physically or mentally infirmed?	☐ YES NO ☐	☐ YES NO ☐	☐ YES NO ☐

INCOME

	Enclosed	N/A
1. Employment income (per T4)		
2. Employment related income not included on T4 tax slips (stock option benefits, car allowances, etc.).		
3. Investment income (per T5, T600) for foreign source income include details of foreign tax withheld; brokerage statements.		
♦ for foreign source income include details of foreign tax withheld;		
♦ brokerage statements.		
4. Partnership income allocations (T5013).		
5. Pensions, annuities, etc. (per T4A, T4A(OAS), T4A(P), T4RIF).		
6. Employment insurance benefits (per T4E).		
7. Trust income (per T3).		
8. Scholarships, bursaries, etc. (T4A).		
9. Business, professional or property income - enclose details of income & expenses (e.g., tax shelters, rental properties, sole proprietorships).		
10. Capital gains & losses - enclose details of transactions during year including year of purchase. Where possible, include all broker statements or closing adjustments.		
11. Alimony or separation allowance.		
12. RRSP withdrawals (T4RSP's).		
13. Please provide a list of Canada Savings Bonds and other investments on which interest is accruing.		

Note: If you do not have an information slip for a particular income item, please state the actual amount received, nature of payment (e.g. tips, interest income, etc.), and the amount of any tax withheld.

DEDUCTIONS FROM INCOME AND CREDITS

	Enclosed	N/A
1. RRSP contributions; include all contribution receipts and your 2019 contribution limit statement attached to your 2018 Notice of Assessment.		
2. Union and professional dues.		
3. Charitable donations (indicate if you are a first time donor).		
4. Political contributions.		
5. Medical expenses (including premiums paid to a private health services plan and fertility treatment expenses incurred in 2007 and later years) - include original receipts. *** Note: if you have many prescription receipts, consider obtaining a summary for 2019 from your pharmacy (rather than providing all of the individual receipts)***		
6. Alimony, maintenance or separation payments - amount, name and address of payee.		

PLEASE ATTACH ALL APPLICABLE INFORMATION SLIPS OR NECESSARY DETAILS

DEDUCTIONS FROM INCOME AND CREDITS (continued)

	Enclosed	N/A
7. Expenses to earn commissions; include a completed and **signed T2200 from your employer**.		
8. Unreimbursed employment expenses (e.g., travelling expenses); include a completed and **signed T2200 from your employer**.		
9. Moving expenses not reimbursed.		
10. Child care expenses (include name, address, and social insurance number of caregiver and receipt from caregiver).		
11. Carrying costs related to investment income (accounting, investment consulting fees & interest).		
12. Tuition fees and education deduction (T2202, T2202A, or TL11A and professional exam receipts). These may be claimed on behalf of a dependant in certain circumstances. Ensure dependant has signed back of form. Costs relating to certain professional exams also qualify for a credit.		
13. Public transit passes. (Only available to Ontario seniors aged 65 or older).		
14. Home Buyers' Amount -		
If you are a first-time home buyer and you are eligible for the Home Buyer's Amount, please provide the date of acquisition of your home and the address of the property.		
15. Receipt or amount for taxpayer's student loan interest.		
16. Amount of property taxes/rent paid in the year and name of landlord/municipality.		

MISCELLANEOUS

	Enclosed	N/A
A. Ontario Benefit Programs 1. Property taxes paid in year. Specify the number of months in year and the municipality to which payments were made. 2. Rental payments in year (include amount paid and name of landlord and number of months rented in year).		
B. Instalments and Notices of Assessment 1. Submit list of instalments paid in respect of 2019 taxes (attach most recent notice). 2. Submit copies of any assessments or reassessments received in 2019 and 2020 to date.		
C. RRSP Home Buyers Plan - Please indicate the portion of RRSP contributions designated as repayments to your Home Buyers Plan. Also include a copy of your Home Buyers Plan statement received from CRA.		
D. Home Accessibility Tax Credit - Please indicate if you incurred costs for your principal residence to improve accessibility or enhance the mobility for a family member over 65, or one eligible to claim the disability tax credit.		

FOREIGN PROPERTY

Did you own foreign properties* at any time in 2019 with a total cost of more than Cdn. $100,000? YES ____◯____ NO ____◯____

*Examples of foreign properties are: foreign bank accounts, shares of foreign corporations, and real properties located outside of Canada.

Foreign properties do not include: vacation properties, and foreign investments held in Canadian registered mutual funds.

DISPOSITION OF REAL PROPERTY

Did you dispose of a real property in 2019? If yes, then please complete the following:

i) Address

ii) Proceeds of disposition

iii) Year of acquisition

iv) Number of years designated as principal residence

DIRECT DEPOSIT

****Note: Canada Revenue Agency is switching to direct deposit for all payments that it issues!****

To sign up or change your direct deposit information with the CRA, please fill out the banking information below, <u>and</u> attach a photocopy of a VOID cheque for your personal bank account. **(Note that if you have already provided this information to us, you do not need to provide it again this year.)**

Branch number ______________________________ Account number ____________________

Financial Institution name: ____

Address: ____ Postal Code ____________

Telephone No. _________________________________

Exact name of account holder if different from yourself _________________________________

PLEASE ATTACH ALL APPLICABLE INFORMATION SLIPS OR NECESSARY DETAILS

RENTAL PROPERTY - INCOME AND EXPENSES

(if you did not own a rental property in 2019, leave this blank)

	Property 1	Property 2	Property 3
1. Rental income			
2. Other income			
3. Advertising			
4. Insurance			
5. Interest			
6. Office expenses			
7. Professional fees (legal, accounting)			
8. Management fees			
9. Repairs & maintenance			
10. Salaries, wages, and benefits			
11. Property taxes			
12. Travel			
13. Utilities			
14. Automobile expenses - see 'Automobile Expenses' chart on page 9			
15. Other expenses (please specify)			
16. Personal % of rental expenses			
17. Ownership % of the rental property			
18. Address of property			

BUSINESS OR PROFESSIONAL INCOME AND EXPENSES **(if you did not have a self-employed business/profession in 2019, leave this blank)**	**AMOUNT**
1. Business/professional income	
2. Advertising	
3. Meals & entertainment	
4. Insurance	
5. Interest	
6. Bank charges	
7. Professional memberships and dues	
8. Office expenses	
9. Supplies	
10. Professional fees (legal and accounting)	
11. Management fees	
12. Rent	
13. Repairs & maintenance	
14. Wages, salaries, and benefits	
15. Property taxes	
16. Travel expenses (note: for automobile expenses, see #20 below)	
17. Utilities	
18. Telephone & internet	
19. Postage & delivery	
20. Automobile expenses - see 'Automobile Expenses' chart on page 9	
21. Capital assets purchased (eg. furniture, equipment, computer equipment, etc) - **please include a photocopy of each purchase invoice**	
22. Private health services plan premiums	
23. Professional development (eg. Conferences - note: do not include meals; include meals in 'Meals & entertainment', ie. #3 above)	
24. Home office expenses - see 'Home Office Expenses' chart on page 10	

PLEASE ATTACH ALL APPLICABLE INFORMATION SLIPS OR NECESSARY DETAILS

EMPLOYMENT EXPENSES (AUTHORIZED, AND UNREIMBURSED)

(if you did not incur expenses authorized by your employer in 2019, leave this blank)

	AMOUNT
Is signed T2200 enclosed?	
1. Travel meals	
2. Hotels and other accomodation	
3. Air and rail fares	
4. Taxi and public transit	
5. Parking	
6. Office supplies	
7. Other supplies (please specify)	
8. Telephone & internet	
9. Professional fees (legal and accounting)	
10. Advertising/promotion	
11. Meals & entertainment (for clients)	
12. Professional memberships and dues	
13. Postage & delivery	
14. Other office expenses	
15. Auto rental	
16. Home office expenses - see 'Home Office Expenses' chart on page 10	
17. Automobile expenses - see 'Automobile Expenses' chart on page 9	

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AUTOMOBILE EXPENSES

	AMOUNT
1. Make	
2. Model	
3. Year	
4. Date of acquisition, if acquired in 2019 **(please provide a copy of the purchase agreement or lease agreement)**	
5. Total number of KM driven in 2019 **(please provide a precise number)**	
6. Number of KM driven in 2019, for business purposes **(please provide a precise number)**	
7. Gas expense	
8. Financing interest expense	
9. Insurance expense	
10. License & registration fees	
11. Repairs & maintenance expense	
12. Leasing costs	
13. Other automobile expenses (please specify)	
14. Parking and tolls expense	

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HOME OFFICE EXPENSES

	AMOUNT
1. Total house area (square feet)	
2. Area of the home office space (square feet)	
3. Heat	
4. Electricity	
5. Insurance	
6. Repairs & maintenance	
7. Mortgage interest	
8. Property tax	
9. Water and sewage	
10. Condo fees	
11. Rent	
12. Other expenses (please specify)	

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COMMENTS

Please fill in any other comments or information you feel is pertinent to your 2019 tax year.

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