

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

- | | <u>Dependant 1</u> | <u>Dependant 2</u> | <u>Dependant 3</u> |
|--|--------------------|--------------------|--------------------|
| 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
infirm? | YES NO | YES NO | YES NO |

DEDUCTIONS FROM INCOME AND CREDITS (continued)

- 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.

Enclosed	N/A

HOME OFFICE EXPENSES

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)

AMOUNT

