

PERSONAL INCOME TAX REMINDER LIST

1. Please Complete this section:

Name: Taxpayer _____ Spouse _____

Address: _____

Contact Phone #: _____ Contact Email: _____

Marital Status: _____ Date of Change: _____

Province of Residence on December 31, 2019: _____ Citizenship (U.S.?) _____

New Dependents? Date of birth and name: _____

Any additional information to advise: _____

2. Please check the boxes that apply to your 2019 taxes and provide the appropriate slips and/or records

INCOME

- | | |
|---|--|
| <input type="checkbox"/> Information slips (T4, T4A, T4(OAS), T4(P), T4E) | <input type="checkbox"/> T4RSP/RIF (RSP or RIF Withdrawals or Annuities) |
| <input type="checkbox"/> Information slips (T3, T5/T5018, T5013) | <input type="checkbox"/> Tips |
| <input type="checkbox"/> Foreign Income/Pension | <input type="checkbox"/> Rental Income and Expenses |
| <input type="checkbox"/> Self-Employment Income and Expenses; GST | <input type="checkbox"/> Sale of Principal Residence |
| <input type="checkbox"/> Capital Gains or Losses (disposal of assets) | <input type="checkbox"/> Support Payments Received |
| <input type="checkbox"/> U.S. Social Security | <input type="checkbox"/> Volunteer Firefighter/Search & Rescue Certificate |

DEDUCTIONS/CREDITS

- | | |
|---|--|
| <input type="checkbox"/> Employment Expenses (include signed T2200) | <input type="checkbox"/> Union or Professional Dues |
| <input type="checkbox"/> Medical/Dental Expenses | <input type="checkbox"/> Donation Receipts (including political donations) |
| <input type="checkbox"/> RRSP Contributions | <input type="checkbox"/> Student Loan Interest |
| <input type="checkbox"/> Child Care Expenses | <input type="checkbox"/> Educator School Supply Expenses |
| <input type="checkbox"/> Support Payments | <input type="checkbox"/> Interest/Carrying Charges on Investments |
| <input type="checkbox"/> Moving Expenses | <input type="checkbox"/> Disability Tax Credit |
| <input type="checkbox"/> First Time Home Buyers | <input type="checkbox"/> B.C. Seniors' Home Accessibility Expenses |
| <input type="checkbox"/> Caregiver Tax Credit | <input type="checkbox"/> Tuition T2202 (signed if transferred from child) |
| <input type="checkbox"/> Other Deductions and Tax Credits: _____ | |

3. If you invested in mutual funds or other securities in 2019, (other than in a RRSP or TFSA) please provide 2019 investment account statements and/or year-end trading summaries/Gain & Loss Reports for 2019.

4. If you spent significant periods of time outside of Canada during 2019, please advise us of the number of days _____.

5. Legislation requires taxpayers to report the ownership of, and transactions in, certain types of foreign assets.

- | | |
|---|--|
| a) Did you own foreign assets with a cost totaling more than \$100,000 during 2019? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| b) Did you earn income or realize gains on foreign assets in 2019? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| c) Did you receive property, funds or a loan from a non-resident trust in 2019? | <input type="checkbox"/> Yes <input type="checkbox"/> No |