

## Personal Income Tax Information for 2019

Name(s): \_\_\_\_\_ Phone: (H) \_\_\_\_\_  
 Address: \_\_\_\_\_ (W) \_\_\_\_\_  
 \_\_\_\_\_ E-mail: \_\_\_\_\_

**Please complete all of the following items applicable to your personal income tax return(s):**

Current marital status: \_\_\_\_\_ (If you are married or common-law, and we are not preparing your spouse's return, please provide your spouse's name, SIN, birth date and 2019 net income)

How many dependants do you have? \_\_\_\_\_ **Please provide names and birthdates of new dependants.**

Did you own any foreign property and/or investments at any time during 2019? YES NO

Did you dispose of any real estate property in 2019, including a principal residence? YES NO

Do you own any non-registered investments? YES NO **If yes, please provide statements for 2019.**

Is everyone included on this form a Canadian Citizen? YES NO If no, please provide details.

Does everyone included on this form agree to provide information to Elections Canada? YES NO

**Please review the following lists in detail, place an (X) beside the items applicable to your personal tax return(s) and provide the information to our office:**

Information slips for the following income:

<input type="checkbox"/>	Employment (T4)	<input type="checkbox"/>	RRSP, DPSP, RPP, RRIF income slips (T4RSP) (T4RIF)
<input type="checkbox"/>	Pension and other (T4A)	<input type="checkbox"/>	Mutual Funds/Estates/Trusts (T3)
<input type="checkbox"/>	Old Age Security (T4OAS)	<input type="checkbox"/>	Interest (T5/T600)
<input type="checkbox"/>	Canada Pension Plan (T4AP)	<input type="checkbox"/>	Partnership Income (T5013)
<input type="checkbox"/>	Employment Insurance (T4E)	<input type="checkbox"/>	Treasury Bills (TBD(1) or (2))
<input type="checkbox"/>	Dividends (T5)	<input type="checkbox"/>	Other:
<input type="checkbox"/>	Share dispositions (T5008)	<input type="checkbox"/>	

Receipts and details for the following deductions or credits:

<input type="checkbox"/>	RRSP contributions	<input type="checkbox"/>	Interest paid (re: investments and student loans)
<input type="checkbox"/>	Union/professional dues	<input type="checkbox"/>	Split pension income between spouses? <b>Y or N</b>
<input type="checkbox"/>	Child care expenses	<input type="checkbox"/>	Real estate sales / costs ( <b>including principal residence</b> )
<input type="checkbox"/>	Moving expenses	<input type="checkbox"/>	Employment expenses (T2200)
<input type="checkbox"/>	Accounting and investment counsel fees	<input type="checkbox"/>	In home care of a parent or dependent senior ( <i>provincial</i> )
<input type="checkbox"/>	Adoption expenses	<input type="checkbox"/>	Care of infirm dependants ( <i>federal</i> )
<input type="checkbox"/>	Charitable donations	<input type="checkbox"/>	Expired bus passes and receipts ( <i>Jan-June</i> )
<input type="checkbox"/>	Tuition and Education (T2202)	<input type="checkbox"/>	Teacher and Early Childhood Educator supplies
<input type="checkbox"/>	Political contributions	<input type="checkbox"/>	Other:
<input type="checkbox"/>	Medical expenses ( <i>including travel costs</i> )	<input type="checkbox"/>	

Provide details of:

<input type="checkbox"/>	<b>Foreign property owned at any time in 2018</b>	<input type="checkbox"/>	Farming income and expenses (including all sales tickets)
<input type="checkbox"/>	<b>Systematic withdrawal from mutual funds</b>	<input type="checkbox"/>	Rental income and expenses
<input type="checkbox"/>	Income tax installments	<input type="checkbox"/>	Self employment income/expense
<input type="checkbox"/>	Canada savings bonds details	<input type="checkbox"/>	Matrimonial support paid or received (SIN of recipient)
<input type="checkbox"/>	Dependant's income	<input type="checkbox"/>	<b>Notices of Assessment or Reassessment</b>
<input type="checkbox"/>	Dependant's education deductions (T2202)	<input type="checkbox"/>	<b>Changes in address, marital status or dependants</b>
<input type="checkbox"/>	Disabled taxpayer or dependants	<input type="checkbox"/>	Void cheque if you wish refunds to be direct deposited
<input type="checkbox"/>	Foreign income	<input type="checkbox"/>	<b>Websites in which internet sales have been transacted</b>
<input type="checkbox"/>	Tradesperson tool purchases during 2018	<input type="checkbox"/>	<i>Other (including bitcoin transaction, etc).</i>

