



2018 Personal Income Tax Return Checklist

A. Personal Information (Mandatory)

New client

Signed T1013

Name of taxpayer completing this form: _____

1. Changes since last year (ex. name, address, date of birth, social insurance number (SIN), and province of **residence**):

2. **Personal status** - If there has been a status change in 2018, provide the date of the change: _____

Married Single Divorced Widowed Separated Living common-law

Y N

4. Did you dispose of a property in 2018 for which you are claiming a principal residence exemption?

5. Are you a Canadian Citizen?

6. Do you authorize CRA to give your name, address, date of birth and citizenship to Elections Canada?

7. Did you own specified foreign property at any time in 2018 with a total cost of more than CAN\$100,000?

8. Did you receive interest, dividends or benefits from a business in which a relative is a key party?

B. Tax Information (Check all that apply)

1. All **information slips**, such as:

T3	T4E	T10	T1164	T5003	RC62	
T4	T4PS	T2200	TL11A	T5007	Other:	_____
T4A	T4RIF	T2202	TL11B	T5008	Other:	_____
T4A(OAS)	T4RSP	T101	TL11C	T5013	Other:	_____
T4A(P)	T5	T1163	TL11D	T5018	Other:	_____

2. Details of **income** for which no T-slips have been received such as:

Business income	Other employment (e.g. tips)	Interest income earned but not received
Professional income	Alimony, separation allowances	Scholarships, fellowships, bursaries
Partnership income	Child maintenance	Any other income (e.g. director fees):
Rental income	Pensions	_____

3. Details of **other investments**, such as:

Capital gains/losses realized	Oil and gas investments	Other:
Real estate investments	Bitcoin or other cryptocurrency transactions	_____

4. Details of **other expenses**, such as:

- Employment related expenses - provide *Form T2200 - Declaration of Conditions of Employment*
- Business, professional, investment and rental expenses (including capital purchases such as vehicles and equipment)
- Home office expenses (with respect to employment, professional or other business income)

5. Details and **receipts** for **other deductions and tax credits**, such as:

Moving expenses	Public transit passes	Tuition fees ⓘ
Child care expenses	Clergy residence (<i>Form T1223</i>)	Interest paid on qualifying student loans
Alimony, separation allowances	Mining tax credit expenses	Disability support expenses
Child maintenance payments	Home Accessibility Tax Credit ⓘ	
Adoption related expenses	Eligible Educator School Supply Tax Credit ⓘ	
Professional and union dues	RRSP and other pension plan contributions and withdrawals	
Medical expenses ⓘ	Film and video production expenditures eligible for a tax credit	
Charitable donations	Tools acquired by tradespersons and eligible apprentice mechanics	
Political contributions	Scientific research and experimental development expenses	

6. Details of **information for additional reporting** requirements:

If we are not preparing your **spouse or common-law partner's personal tax return**, please provide their return for review and tax planning. Your spouse or common-law partner's **net income from line 236** of their return will need to be reported on your return.

List of **dependants/children** including their **income**, birth date, and SIN, if changed during the year: _____

You **disposed of your principal residence or other real property** - please provide: proceeds of disposition, a description of the property, and year the property was acquired.

You **owned foreign property** at any time in 2018 with a total cost of more than CAN\$100,000, please provide: a description of the property, related country, maximum cost in the year, cost at year-end, income, and capital gain/loss for each particular property. ⓘ

You filed a **foreign tax return** - provide a copy of the return and any associated tax assessments and/or transcripts.

You qualify for the **Northern Residents Deduction** - provide completed *Form T2222*. ⓘ

You received **income** from, or made **distributions** to, **foreign entities** such as foreign affiliates and trusts.

You have **Internet Business Activities**, please provide: a) the number and address of webpages or websites that your business generates income from. If you have more than 5, provide the 5 that generate the most income, and, b) the percentage of income generated from the Internet (if you do not know the exact percentage, provide an estimate). ⓘ

You or your dependent is **disabled** - provide *Form T2201, Disability Tax Credit Certificate*. ⓘ

C. Questions to Answer

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Are you a **U.S. citizen, Green Card Holder**, or were you, or your parents **born in the United States**?

Are you an **aboriginal** person? Special tax rules may apply.

Are you the **caregiver** for any infirm family members? Did you provide in-home care for an infirm dependent relative?

If you have children up to the age of 17, have you received the **Canada Child Benefit (CCB)**? ⓘ

Have there been any other significant life events in the past year, such as the death or impairment of a loved one?

Did you incur costs to access **medical intervention** required in order to conceive a child which was not previously allowed as a medical expense? ⓘ

Did you purchase a new home in 2018? If so, you may be eligible for the new **residential property GST/HST rebate**.

Are you a first-time home buyer in 2018? A federal tax credit based on \$5,000 (@15% = \$750) may be available.

Have you spent more than 200 hours acting as a **volunteer firefighter** or a **search and rescue volunteer**?

Have you made any contributions to a gifting tax shelter?

Did you receive any significant prizes or awards from your, or a related person's place of employment?

Did you receive a retroactive lump-sum payment over \$3,000 (for example, spousal support)? In certain cases, some tax relief may be available.

Do you want your tax refund deposited directly into your account at a financial institution? Complete *Form T1DD*

D. Other - Learn More

1. Instalments required for 2019? Sign up for CRA's **Pre-Authorized Debit** Arrangement. ⓘ
2. **MyCRA mobile App** – This web App allows you to access and view key portions of your tax information such as your notice of assessment, tax return status, benefit and credit information, and RRSP and TFSA contribution room.
3. Canada Job Grant – 2/3rds of certain employee training courses may be eligible for this grant. If interested in improving your skills, ask your employer about this opportunity.
4. CRA Online Services – Account Alerts – receive alerts on changes or new mail from CRA. ⓘ
5. CRA Online Services – Link between CRA's My Account and My Service Canada Account. ⓘ
6. Additional **provincial/territorial credits** and programs may be available.

***If you require more information on items on the checklist, please visit <https://ncca.co/checklist/>

ADDITIONAL INFORMATION

Medical expenses - You can claim medical expenses for you, your spouse and dependent persons that were paid for in any 12-month period ending in 2018, and if you did not claim them in 2017. See CRA's website for a complete list of eligible medical expenses.

Tuition fees - You can claim eligible tuition fees for both full-time and part-time courses for you or a dependant including mandatory ancillary fees, and Forms T2202, TL11A, B, C and D where applicable.

Home Accessibility Tax Credit - Certain expenditures (up to \$10,000) may be eligible for a tax credit if made in relation to a renovation or alteration of your home to enhance mobility or reduce the risk of harm for an individual who is either, eligible for the Disability Tax Credit, or 65 years of age or older at December 31, 2018. Examples of eligible expenditures include amounts relating to wheelchair ramps, walk-in bathtubs, wheel-in showers and grab bars.

Eligible Educator School Supply Tax Credit - If you are a teacher or early childhood educator, please provide receipts (up to \$1,000) for eligible school supplies purchased in the year. An eligible supply expense is an amount paid in the year for supplies used or consumed in the school or regulated child care facility in the performance of your employment. Supplies include consumable goods such as construction paper, flashcards, items for science experiments, art supplies, and stationary items, and durable goods limited to games, puzzles, books, containers and educational support software. Please also provide a certification from your employer attesting to the eligible supplies expense.

Foreign property - Includes cash, stocks, trusts, partnerships, real estate, tangible and intangible property, contingent interests, convertible property, etc. Required details include: description of the property, related country, maximum cost in the year, cost at year-end, income, and capital gain/loss for each particular property. For property held in an account with a Canadian securities dealer or Canadian trust company, please provide the country for each investment, fair market value of the investments at each month-end, income or loss on the property, and gain/loss on disposition of the property.

Northern Residents Deduction - You qualify if you have lived on a permanent basis, in a prescribed northern zone (Zone A) or a prescribed intermediate zone (Zone B) for a continuous period of at least six consecutive months. Prescribed zones can be found on CRA's website.

Internet Business Activities - According to CRA, Internet business activities include any activity where you earn income from your webpages, websites, or Apps. Information only webpages and websites like directories or ads will not generally trigger this information requirement.

Disability Tax Credit - The transfer rules allow claims for certain dependent relatives. In addition, are you, or would you like to provide support to a disabled person? Tax planning opportunities may be available, such as the establishment of a Registered Disability Savings Plan.

Canada Child Benefit (CCB) - If you have children up to the age of 17, have you received the Canada Child Benefit (CCB)? The CCB is an income tested benefit and therefore may not be provided to certain higher income individuals who previously received the Universal Child Care Benefit which ceased in mid-2016.

Medical intervention - If you incurred costs to access medical intervention required in order to conceive a child which was not previously allowed as a medical expense - amounts may be claimed in respect of any such expense for the previous 10 years (if amounts were incurred in 2008, a claim must be made by the end of 2018).

CRA Pre-Authorized Debit Arrangement - This an online service-payment option which authorizes CRA to withdraw a pre-determined payment amount directly from a bank account on a specific date to pay taxes. This may help avoid penalties on late and/ or missing instalment payments.

NEW! CRA Online Services – Account Alerts – Individuals can register with CRA to be notified by email when CRA's record of an individual's address has changed, banking information for direct deposit has changed, or if mail sent by CRA was returned.

NEW! CRA Online Services – Link between CRA's My Account and My Service Canada Account – Individuals can now access these two accounts through a single sign-in session. When switching between Accounts, users must authorize their SIN to be transmitted to the other department. My Service Canada administers a number of programs such as Employment Insurance, Old Age Security, Guaranteed Income Supplement and Canada Pension Plan.