

### Personal Income Tax (T1) Checklist for 2019

IDENTIFICATION AND CONTACT INFORMATION (Taxpayer)				
Full Name	SIN	Phone		
Birthdate MM/DD/YY	Citizenship	Email		
INFORMATION OF SPOUSE				
Full Name	SIN	Phone		
Birthdate MM/DD/YY	Citizenship	Email		
DEPENDENT(S)				
Full Name	Birthdate MM/DD/YY	SIN	Citizenship	Custody
Full Name	Birthdate MM/DD/YY	SIN	Citizenship	Custody
CHANGES (IF ANY)				
Current Address				
Marital Status (as of Dec. 31/19)		Date of Change in Marital Status		
INVESTMENT ADVISOR				
Name	Email	Phone		

Please review the below given lists and check those items that apply to you (Taxpayer) and your spouse (Spouse).

**Taxpayer      Spouse**

**Taxpayer      Spouse**

#### Income

- |                          |                          |                                                   |                          |                          |                                                                              |
|--------------------------|--------------------------|---------------------------------------------------|--------------------------|--------------------------|------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Employment Income (T4 or T4A Slips)               | <input type="checkbox"/> | <input type="checkbox"/> | Rental Income and Expenses                                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | Pension Income (T4A, T4OAS, T4AP Slips)           | <input type="checkbox"/> | <input type="checkbox"/> | Capital Gains (Please indicate the cost and proceeds of any asset disposals) |
| <input type="checkbox"/> | <input type="checkbox"/> | Employment Insurance Benefits (T4E Slips)         | <input type="checkbox"/> | <input type="checkbox"/> | Self-Employment Income and Expenses                                          |
| <input type="checkbox"/> | <input type="checkbox"/> | Investment Income – Interest Dividends (T5 Slips) | <input type="checkbox"/> | <input type="checkbox"/> | Retirement Income (RRSP, RRIF, Annuity)                                      |
| <input type="checkbox"/> | <input type="checkbox"/> | Estate/Trust/Mutual Fund Income (T3 Slips)        | <input type="checkbox"/> | <input type="checkbox"/> | Other Income, Death Benefits, Support Received etc                           |
| <input type="checkbox"/> | <input type="checkbox"/> | Partnership Income (T5013)                        | <input type="checkbox"/> | <input type="checkbox"/> |                                                                              |

#### Deductions and Credits

- |                          |                          |                                                                                            |                          |                          |                                                         |
|--------------------------|--------------------------|--------------------------------------------------------------------------------------------|--------------------------|--------------------------|---------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | RRSP Contributions                                                                         | <input type="checkbox"/> | <input type="checkbox"/> | T2201 Slips (Disability Deductions, Self or Dependents) |
| <input type="checkbox"/> | <input type="checkbox"/> | Tuition Receipts (T2202 Form)                                                              | <input type="checkbox"/> | <input type="checkbox"/> | Charitable Donations                                    |
| <input type="checkbox"/> | <input type="checkbox"/> | Union, Professional Dues Receipts                                                          | <input type="checkbox"/> | <input type="checkbox"/> | Student Loan Interest Statement                         |
| <input type="checkbox"/> | <input type="checkbox"/> | Child Care Expenses (SIN, Name and Address of Caregiver)                                   | <input type="checkbox"/> | <input type="checkbox"/> | Eligible Support Payments                               |
| <input type="checkbox"/> | <input type="checkbox"/> | Moving Expenses                                                                            | <input type="checkbox"/> | <input type="checkbox"/> | Other Deductions (Carrying Charges, Interest)           |
| <input type="checkbox"/> | <input type="checkbox"/> | Medical Expenses                                                                           |                          |                          |                                                         |
| <input type="checkbox"/> | <input type="checkbox"/> | T2200/TLI2 Forms (Employment Expenses - Include Statement of Exp.)                         |                          |                          |                                                         |
| <input type="checkbox"/> | <input type="checkbox"/> | Amount of Property Tax/Rent Paid in Year (include Landlord's Name and Address of Property) |                          |                          |                                                         |

### Personal Income Tax (T1) Checklist for 2019

Taxpayer      Spouse

**Other**

- |                          |                          |                                                                                              |
|--------------------------|--------------------------|----------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Copy of 2018 Notice of (Re)Assessment                                                        |
| <input type="checkbox"/> | <input type="checkbox"/> | Income Tax Installments, Final Statement Indicating 2019 Total                               |
| <input type="checkbox"/> | <input type="checkbox"/> | Details of Canada Savings Bonds Purchases/Cashed in and on Hand                              |
| <input type="checkbox"/> | <input type="checkbox"/> | Direct Deposit my Refund (Enclose 'Void' Cheque for Account Info)                            |
| <input type="checkbox"/> | <input type="checkbox"/> | Details of any Residence Sold During the Year                                                |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you received any private corporation dividends not exempt from TOSI?                    |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you authorize CRA to provide information about you to Elections Canada? (Check for 'Yes') |
| <input type="checkbox"/> | <input type="checkbox"/> | List of Foreign Property Owned if Cost > \$100,000 (T1135)                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you a U.S. Green Card Holder? (Check for 'Yes')                                          |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you spend more than 120 days in the U.S. during 2019? (Check for 'Yes')                  |

**Syed A. Raza Professional Corporation, CPA**

***Licensed Public Accountant***

***Tel: 647-499-6636***

***Cell: 647-999-5536***

***Fax: 1-888-611-8836 (Toll Free)***

***Email: [raza@accountantcpa.ca](mailto:raza@accountantcpa.ca)***

***Website: [www.accountantcpa.ca](http://www.accountantcpa.ca)***